RESEARCH REPORT FOR GOOGLE

DIGITAL WELLBEING OF FAMILIES

APRIL 2019

RESEARCH OBJECTIVES

Google commissioned Fluent to conduct a research study to examine the role digital technology plays in the wellbeing of families.

Fluent conducted two phases of research:

- Phase I consisted of of qualitative focus groups and ethnographies, and quantitative surveys among families with children aged 2 to 18 in the US, Brazil and India.
- Phase II of the research consisted of quantitative surveys among families with children aged 2 to 18 in Mexico, Germany, Russia, Japan, Korea, the Philippines, and Thailand.

The research study was designed to explore the following key questions:

1. What aspirations do parents and children have for their families, and what challenges do they face in achieving their goals?
2. What role does digital technology play in families' lives? What are its perceived benefits and drawbacks?
3. How do families achieve balance in integrating technology into their lives?
4. Are all families alike when it comes to their digital wellbeing? What are the distinct profiles of families in relation to digital wellbeing?

CONTRIBUTION OF THE STUDY

To date, a considerable body of research has sought to understand how children and parents use digital technology, and what effect it has on children's behaviors and parenting styles. While the prior research provides a number of important insights, it does not provide an understanding of the effects of digital technology on family as a unit. Our research seeks to fill this gap by examining the influence of digital technology on family as a whole.

DIGITAL WELLBEING OF FAMILIES

METHODOLOGY

RUSSIA: HOUSEHOLDS — 1,000

GERMANY: HOUSEHOLDS — 1,000

2,000 — 22 QUALITATIVE GROUPS
US: HOUSEHOLDS

MEXICO: HOUSEHOLDS — 1,000

KOREA: HOUSEHOLDS — 1,000

JAPAN: HOUSEHOLDS — 1,000

THAILAND: HOUSEHOLDS — 1,000

PHILIPPINES: HOUSEHOLDS — 1,000

INDIA: HOUSEHOLDS — 1,000 — 12 QUALITATIVE GROUPS

INDONESIA: HOUSEHOLDS — 1,000

BRAZIL: HOUSEHOLDS — 1,000 — 12 QUALITATIVE GROUPS

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METHODOLOGY

QUALITATIVE PHASE

Research conducted October 29 - November 10, 2018

US: 8 focus groups with parents of children age 2-18

             6 focus groups with kids age 6-18

             8 in-home ethnographies with families

             Phoenix, AZ, Dallas, TX, St. Louis, MO, Iselin, NJ

Brazil: 4 focus groups with parents of children age 2-18

             4 focus groups with kids age 6-18

             4 in-home ethnographies with families

             Sao Paolo, Fortaleza

India: 4 focus groups with parents of children age 2-18

             4 focus groups with kids age 6-18

             4 in-home ethnographies with families

             Delhi, Mumbai

Screening criteria:
* Parents: user of smartphones/tablets (at least 50% Android), mix of gender and other personal and family demographic variables
* Children: user of smartphones/tablets (at least 50% Android), mix of gender and other personal and family demographic variables

QUANTITATIVE PHASE

Survey conducted online November 20-27, 2018 in the U.S., Brazil and India, and January 25 – February 19, 2019 in Indonesia, Japan, Korea, the Philippines, Thailand, Germany, Russia, and Mexico.

Total N=12,000 parents and N=6,000 teens

US: N=2,000 households:

                1000 parents of 2-12 year-olds

                1000 parents + teens age 13-18

10 countries: N=1,000 households:

                500 parents of 2-12 year-olds

                500 parents + teens age 13-18

Screening criteria:
* Parent of child age 2-18
* Parent owns tablet or smartphone
* Child age 6-18 owns or personally uses smartphone or tablet
* Child age 2-5 uses apps at least a few times a month

NOTE

Samples are not intended to be representative of the general population of each country. The US sample is geographically and socio-economically diverse. Samples in other countries reflect more educated/affluent populations in urban areas. Samples in all countries are from digitally-connected households (i.e., both parent and child use smartphones/tablets).

DIGITAL WELLBEING OF FAMILIES

EXECUTIVE SUMMARY

1. FAMILY WELLBEING

Families share universal needs, desires and aspirations for their family's safety, growth and connection. Families also differ in many respects, mainly in how they experience and manage stress. The relationship between these two dimensions – wellbeing and stress – inform families' outlook on life and on digital technology.

2. ROLE OF TECHNOLOGY IN FAMILY WELLBEING

Our research reveals a strong relationship between digital technology and family wellbeing: along with demographic variables and family interactions, usage and perceived benefits of technology contribute significantly to family wellbeing. Technology appears to play even a bigger role in contributing to family stress. (Note: a cross-sectional study cannot establish the causal *direction* of the relationship).

Digital technology is integrated into every aspect of family life, contributing to both wellbeing and stress. It has a wide range of paradoxical effects on families: like all technologies, it solves certain problems, while creating new ones. While this complicates families' relationship to digital technology, respondents in all eleven countries demonstrate overall positive attitudes towards digital technology. The research identified four key dimensions where technology plays an important role, albeit in sometimes contradictory ways:

Safety vs Danger: Digital technology both enhances families' sense of security and serves as a source of new worries and risks. However, the majority of parents believe that digital technology has a positive effect on safety of their families. Many parents cannot imagine being without their devices for the purposes of reaching or keeping tabs on their kids. Technology also offers a safe alternative to risk behaviors and dangers lurking outside home. Nevertheless, digital technology exposes children to potentially harmful content and safety concerns. Parents are challenged to find ways to protect their children from bullying, online scams and trolling, and inappropriate content and language.

Productivity vs Waste: Families use digital technology for numerous productive purposes: to schedule and organize their family activities, shop, find bargains, research school projects, work from home, search for answers to their questions, learn new skills, try new recipes, and myriad other tasks. While digital technology saves time and increases efficiencies, it also often leads to distraction and, in some cases, addiction to digital activities. Many parents worry that their child is becoming addicted to digital technology. Parents are complicit in their own addictive behaviors. Self-governance with respect to technology is a major issue for many of them. Parents' addictive digital behavior does not go unnoticed by their children, who often feel resentment at what they see as a double-standard.

Child's Healthy Development vs Developmental Harm: Digital technology is widely perceived to contribute to children's cognitive development, helping them gain knowledge and skills and exposing them to the wider world. The majority of parents attest to the positive impact of digital technology on their child's intellectual development, social life, and emotional wellbeing. Notably, very few parents deem the effect of digital technology on their child's development to be negative. In addition, tech literacy is commonly seen by both parents and kids as a necessary skill, a fundamental need for creating future opportunities, and a viable avenue to financial security. However, parents express concern over digital technology's impact on their children's social skills, on their ability to focus and sustain their attention, and on their physical health.

Family Connection vs Family Isolation: Digital technology can be both unifying and dividing for families; it serves to both connect and isolate. Parents and kids confessed to their own and their family members' susceptibility to digital diversion, to times spent "alone together." But they also credited digital technology with enabling shared activities and engendering shared interests. Most parents believe digital technology has a positive effect on their family connection. Technology often serves to facilitate communication and it is often the topic of conversation or the trigger for parent-child interaction.

3. IN SEARCH OF BALANCE

Families seek balance in their use of technology, in integrating technology into achieving goals and maintaining priorities, while avoiding technology's potential adverse effects. A key adaptive challenge is not one of rejecting or banning new behaviors and norms driven by technology, but of working out the proper parameters for children's and their own usage. Achieving the desired balance is a key part of digital wellbeing - of family wellbeing. Families use some combination of the following ingredients to arrive at the optimal recipe for their digital wellbeing: rules regarding their child's use of devices; monitoring apps; an honor system; alternative after school activities; modeling of proper digital usage by parents; and staying abreast of research and expert recommendations.

4. FAMILY PERSONAS

Families differ in the way they use digital technology and their attitudes towards technology's benefits and drawbacks. We have identified distinct types of families with respect to their relationship to digital technology and its role in their families' wellbeing.

Strivers are go-getting, aspiring, restless, and achievement-oriented. High overlap with the new "aspirational class" – a cohort focused on self-improvement, self-education, and acquisition of cultural capital. They are stressed, but this stress is self-generated. A major concern is preparing their children to get ahead by making them well-rounded and active. Their devices are integral to their lives – as both stressors and de-stressors.

Well-adapted comprises a combination of early adopters, techies, and successful adapters; they seem to have more relaxed attitudes; they see tech as facilitating family closeness and more open communication; they enjoy clearer parameters on child usage coupled with more confident parenting.

Unhappy Campers appear frustrated, discouraged, and aggravated with many aspects of their lives, with less trusting, happy, or functional families; and tech is implicated in this dour situation.

Coasters seem to be muddling through, okay with life as it is; their current wellbeing is not ideal, but it is not so bad as to stress them; they have dropped out of the rat race in some sense and are less vested in tech and less concerned with its role in their lives.

5. COUNTRY DIFFERENCES

Families across the eleven countries included in this research share universal needs, desires and aspirations for their children's and family's wellbeing. Families also differ in their priorities, parenting styles, and their relationship to technology – both within each country and across countries. The intra-country family differences are reflected in the personas present in each country. The inter-country differences appear to be driven by the following factors:

- The economic development of the country

- The technology adaptation level

- Culture

The research strongly suggests that it is the interplay of these three factors, rather than any one dominant factor, that inform families' outlook on life and the role of digital technology in their lives. This is reflected in the fact that regional similarities are less pronounced than one would have expected: Japan shares more similarities with Russia than with neighboring Korea, and India shares more commonalities with Brazil than with Thailand.

1

DIGITAL WELLBEING OF FAMILIES

FAMILY WELLBEING

In one of the greatest lines in the history of the novel, Tolstoy makes a sweeping observation that all happy families are alike. Can a similar argument be applied to the wellbeing of families?

Indeed, evidence points to the universal needs, desires and aspirations that families share across nations and demographic groups. These include basic needs: safety, health, financial stability. They also include aspirational goals: those of individual growth and empowerment, and those of family connection and relationships.

Families, including those that score high on the wellbeing index, also differ in many respects, mainly in how they experience and manage stress, and how they navigate the demands of their busy lives.

In this report, we examine the relationship between two key dimensions that inform families' outlook on life and on digital technology:

WELLBEING

- Basic needs: safety, health, financial stability
- Personal growth and individual needs
- Family connection and relationships

STRESS

- Time shortage
- Harried lives
- Family isolation and discord

"All happy families are alike; each unhappy family is unhappy in its own way."

LEO   TOLSTOY

SATISFACTION WITH BASIC NEEDS

Safety

Physical Fitness

Healthy Diet

Financial Security

SATISFACTION WITH FAMILY CONNECTION

Being a role
model to children

Spending time
with family

SATISFACTION WITH PERSONAL GROWTH AND INDIVIDUAL NEEDS

Gaining knowledge
and skills

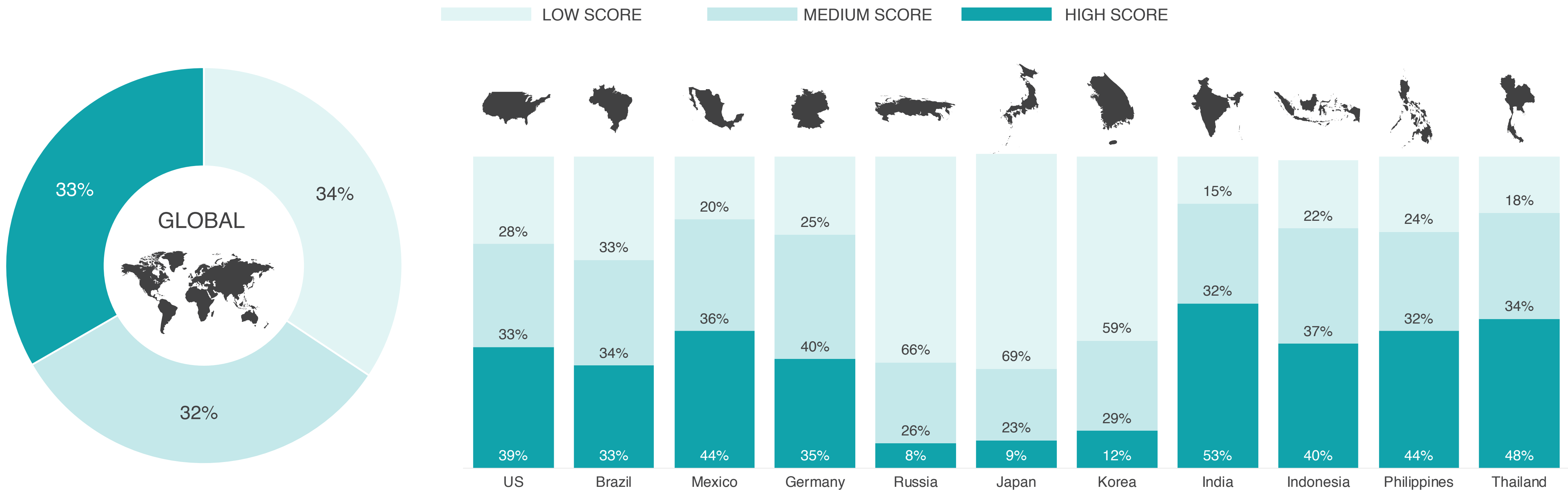Having
'Me' time

DESCRIBE FAMILY AS…

Happy

Caring

Close-knit

F A M I L Y   W E L L B E I N G

THE WELLBEING INDEX

The wellbeing index was constructed based on satisfaction and family description ratings.

LOW SCORE   MEDIUM SCORE   HIGH SCORE

GLOBAL

33%

34%

32%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
Low score	28%	33%	20%	25%				15%	22%	24%	18%
Medium score	33%	34%	36%	40%	66%	69%	59%	32%	37%	32%	34%
Medium lower					26%	23%	29%				
High score	39%	33%	44%	35%	8%	9%	12%	53%	40%	44%	48%

FAMILY WELLBEING

THE WELLBEING INDEX

For analysis purposes, we grouped respondents' scores on the wellbeing index into low, medium, and high score clusters. In the US and Brazil, families fall into three roughly equal groups based on their wellbeing scores. Japan and Russia have the largest proportion of families scoring low on the wellbeing index, while India has the largest proportion of high-scoring families.

DESCRIBE FAMILY AS…

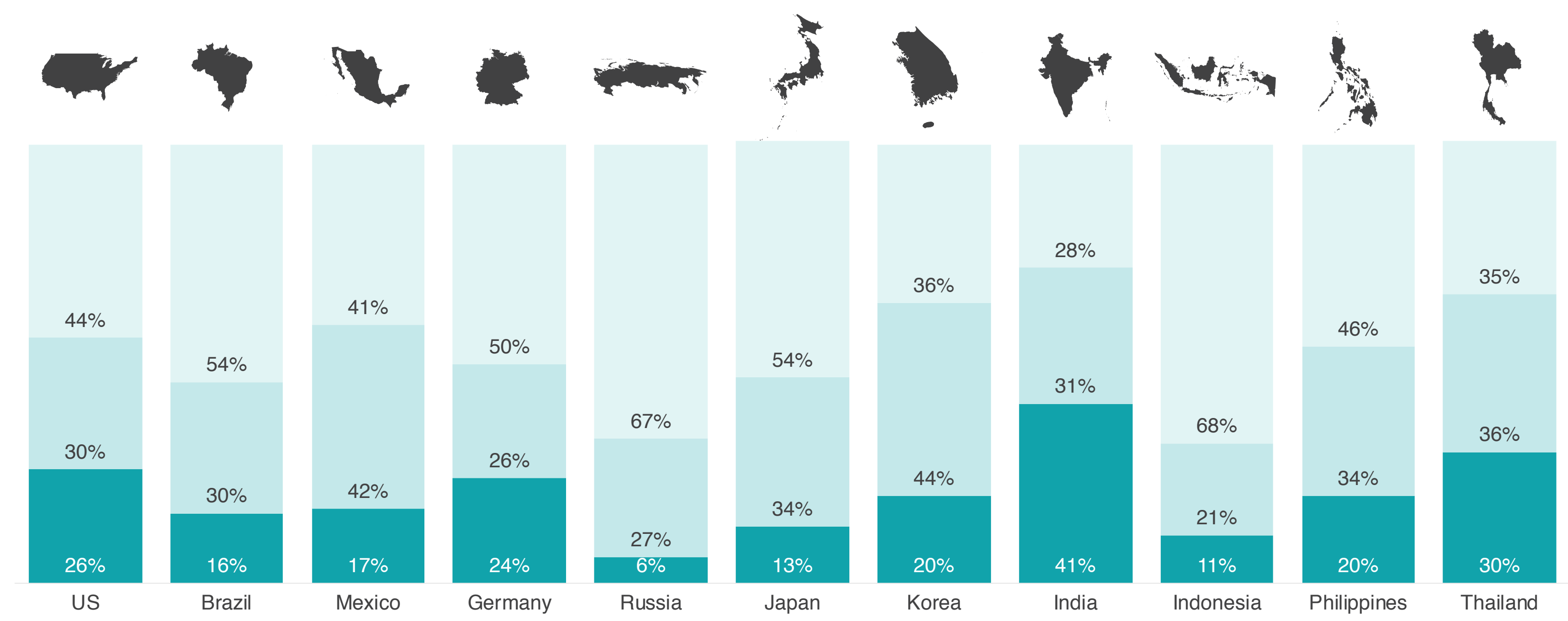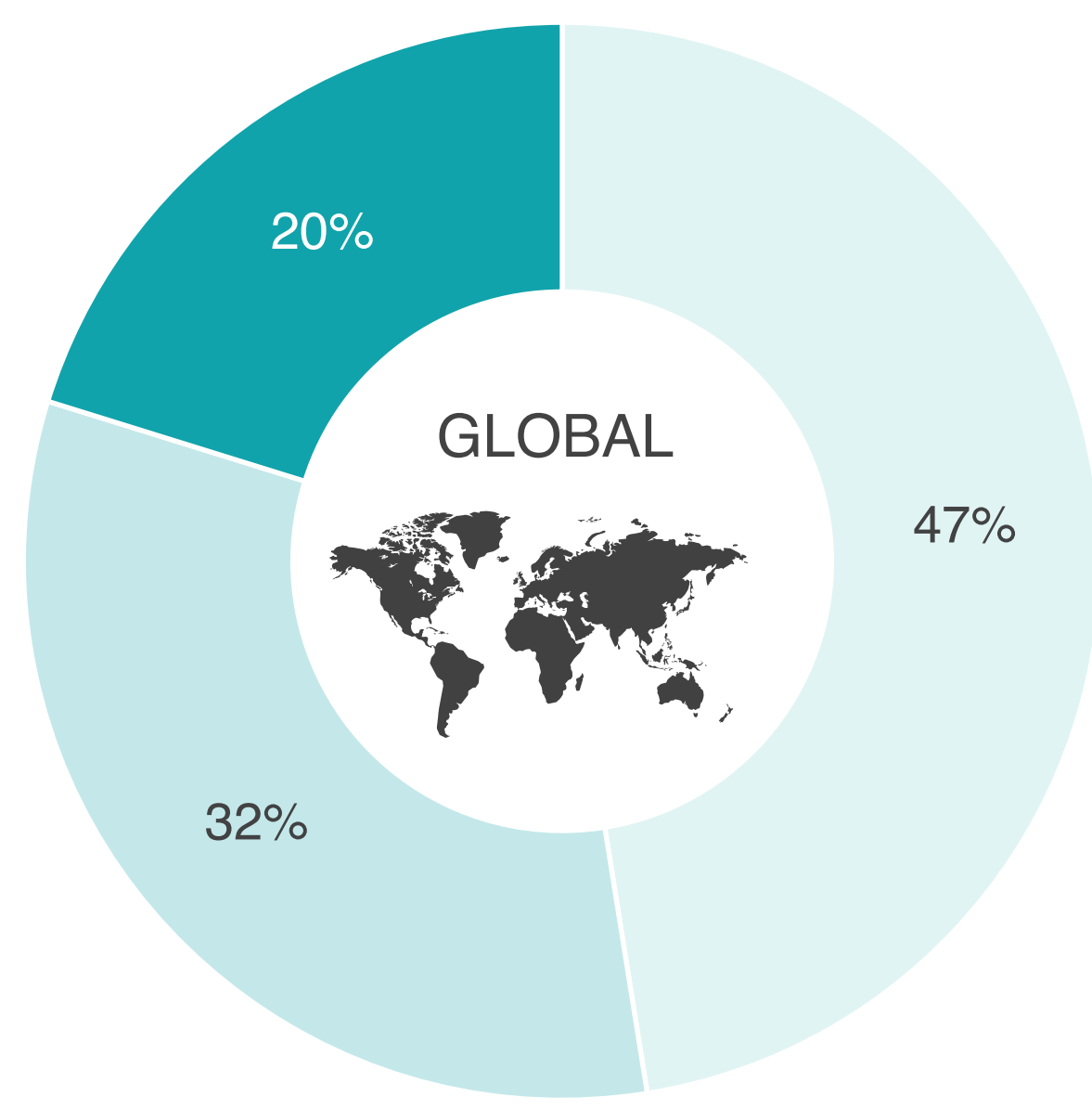Stressed out

Always rushed for time
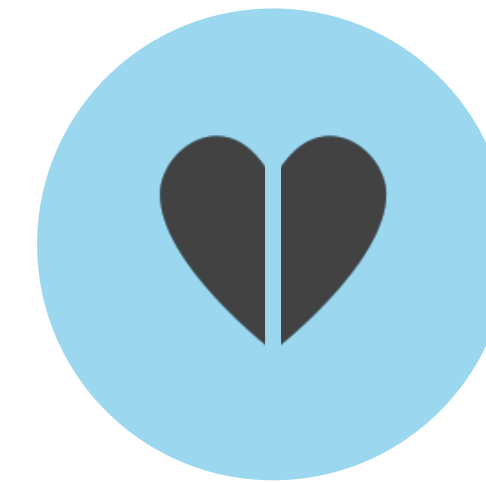
Isolated or disconnected from each other

THE STRESS INDEX

The stress index was constructed based on parents' descriptions of their families.

LOW SCORE   MEDIUM SCORE   HIGH SCORE

GLOBAL

20%

47%

32%

US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
44%	54%	41%	50%	67%	54%	36%	28%	68%	46%	35%
30%	30%	42%	26%	27%	34%	44%	31%	21%	34%	36%
26%	16%	17%	24%	6%	13%	20%	41%	11%	20%	30%

FAMILY WELLBEING

THE STRESS INDEX

Russia, Indonesia and Japan have smallest proportion of highly stressed families while India has the largest.

FAMILY WELLBEING

WELLBEING AND STRESS

Wellbeing and stress are not the opposite ends of one dimension. A significant number of families who score high on the wellbeing index are also highly stressed (10% globally).

Cultural differences evidently play a role in families' experience with and management of stress: in India, more than one in four families are doing well and experiencing high stress while in Russia only 1% fall in that category.

GLOBAL
10%

US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
12%	7%	8%	9%	1%	2%	4%	28%	6%	12%	16%
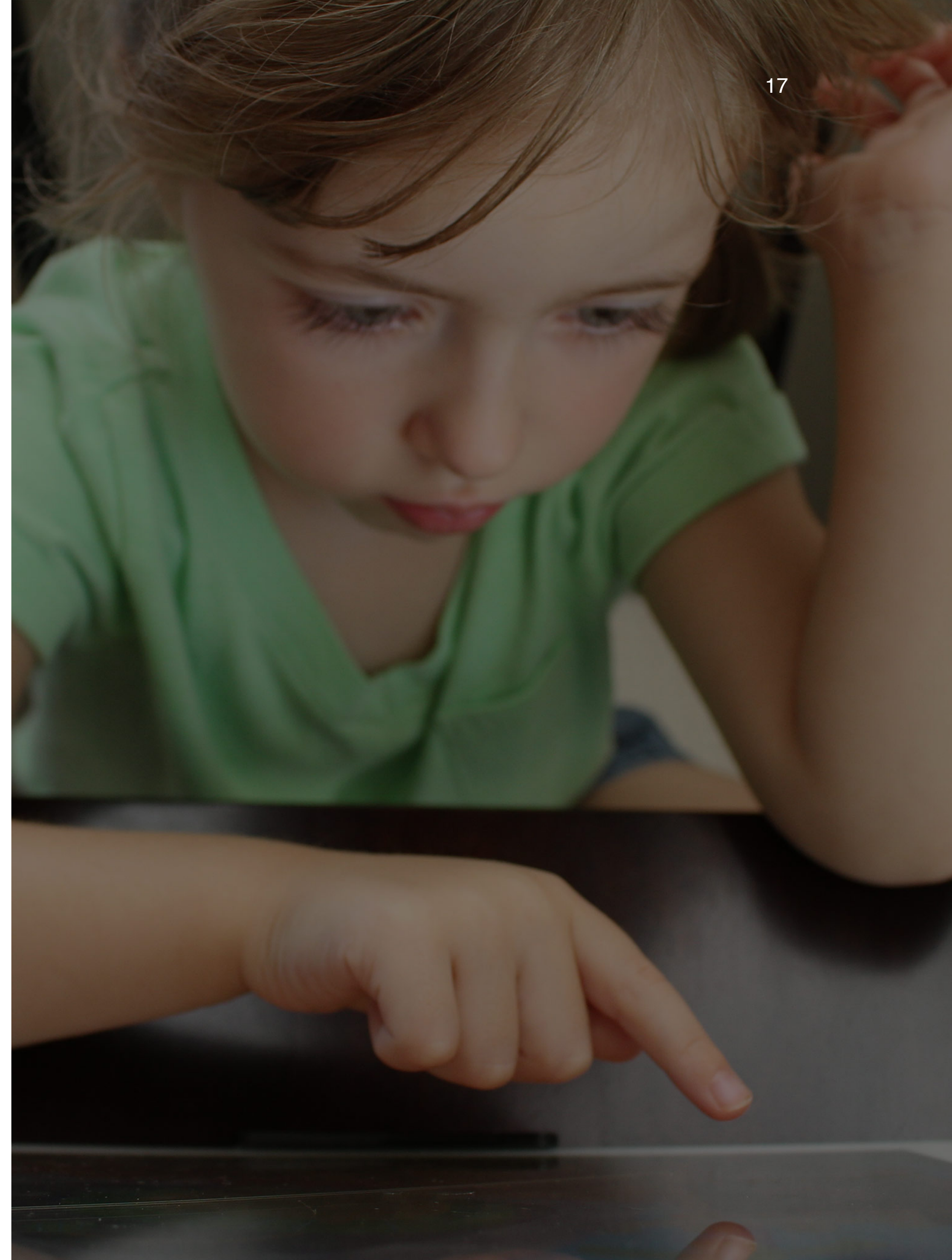
FAMILY WELLBEING

"Nowadays, I think we make the stress for ourselves because we always have something going on. My wife's on the cell phone constantly, she likes to use those sites where they're selling things. And my daughter, if I'm not watching her, she's on YouTube, or we all have Netflix on our phones. It's a constant – and I think with that, you're talking to more people, you're making more plans. You're setting yourself up for a busier day. We all have a different schedule going on. It's stressful. That's pretty much the week."

FATHER OF 13-15 YEAR OLD

2

DIGITAL WELLBEING OF FAMILIES

THE ROLE OF TECHNOLOGY IN FAMILY WELLBEING

"The phone either rings, there's an email, or there's a text, or there's an alert. You can't – unless I was to leave the phone behind, you can't really get away from it. And it's very hard to leave the phone behind you. So, I feel like it might be harder for us, it's more necessary. It's become one of those things that you can't imagine what 1990s was like without this phone. I remember being there, but it's still very difficult to think like, how I would go without this phone, anywhere?"

FATHER OF 13-15 YEAR OLD

INTEGRATION OF DIGITAL TECHNOLOGY INTO FAMILY LIFE

Digital technology is ubiquitous, and families engage with it from the moment they wake in the morning till they go to sleep. They engage with it for a wide range of purposes:

Work and schoolwork

Health

News updates

Social interaction
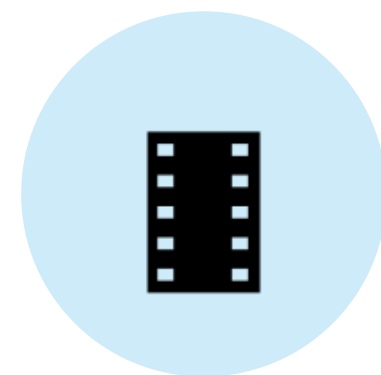
Relaxation and entertainment
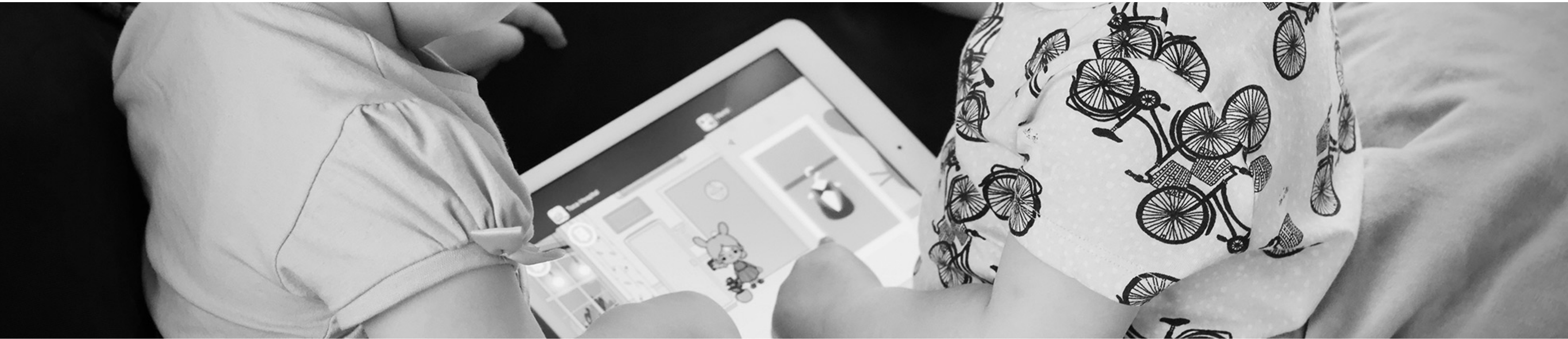
Scheduling

Shopping

Researching

Keeping tabs on children

Digital devices are so thoroughly integrated into families' lives that they are largely taken for granted, and parents assume this integration will only deepen with time.

DOES TECHNOLOGY CONTRIBUTE TO FAMILY WELLBEING?

While we cannot demonstrate causality in a cross-sectional study such as this, our analysis reveals a strong relationship between technology and family wellbeing, and even a stronger relationship between technology and family stress.

Family wellbeing and family stress are driven by a variety of factors:

Demographics

- Parent's gender, education, marital status
- Number of children at home
- Location

Family Interactions

- Frequency of family activities
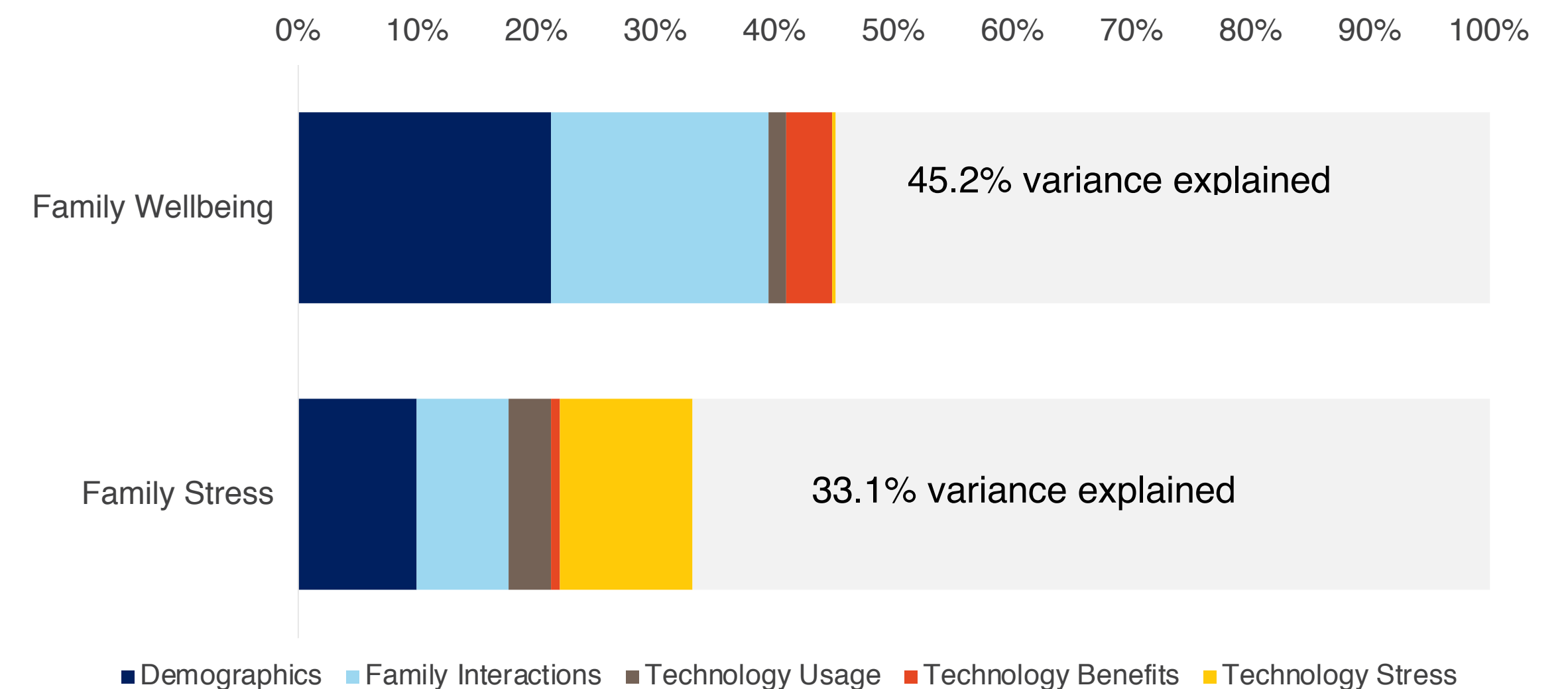- Rules and communication
- Concerns about children, finances

Family Usage of Technology

Perceived Benefits of Digital Technology

Perceived Stress of Digital Technology

- Technology a source of family discord
- Child more tech savvy than parent

Predictors of Family Wellbeing and Family Stress (Global)

Note: a cross-sectional study cannot establish the causal *direction* of the relationship

THE PARADOXES OF DIGITAL TECHNOLOGY

Digital technology appears to have a wide range of paradoxical effects on families, which complicates their attitudes towards it. Like all technologies, it solves certain problems, while creating new ones.

WELLBEING	STRESS
Helps families feel safer	Exposes families to danger (scams, trolls, inappropriate content)
Improves productivity	Leads to distraction, waste of time
Attentional investment (problem-solving, education, research)	Attentional waste (addictive pursuits)
Enhances intellectual development and empowerment	Stunts social and communications skills
Brings family together	Causes tension and family discord
Helps get some "me time"	Leads to separation, "Alone together"
It makes parenting easier	If feels like a cop-out, leads to parents' guilt

DIGITAL TECHNOLOGY EFFECT ON FAMILY WELLBEING AND STRESS

Research suggests that digital technology affects families' wellbeing and stress in multiple ways:

AMPLIFICATION EFFECT

Digital technology reinforces both positive and negative dynamics in families' lives
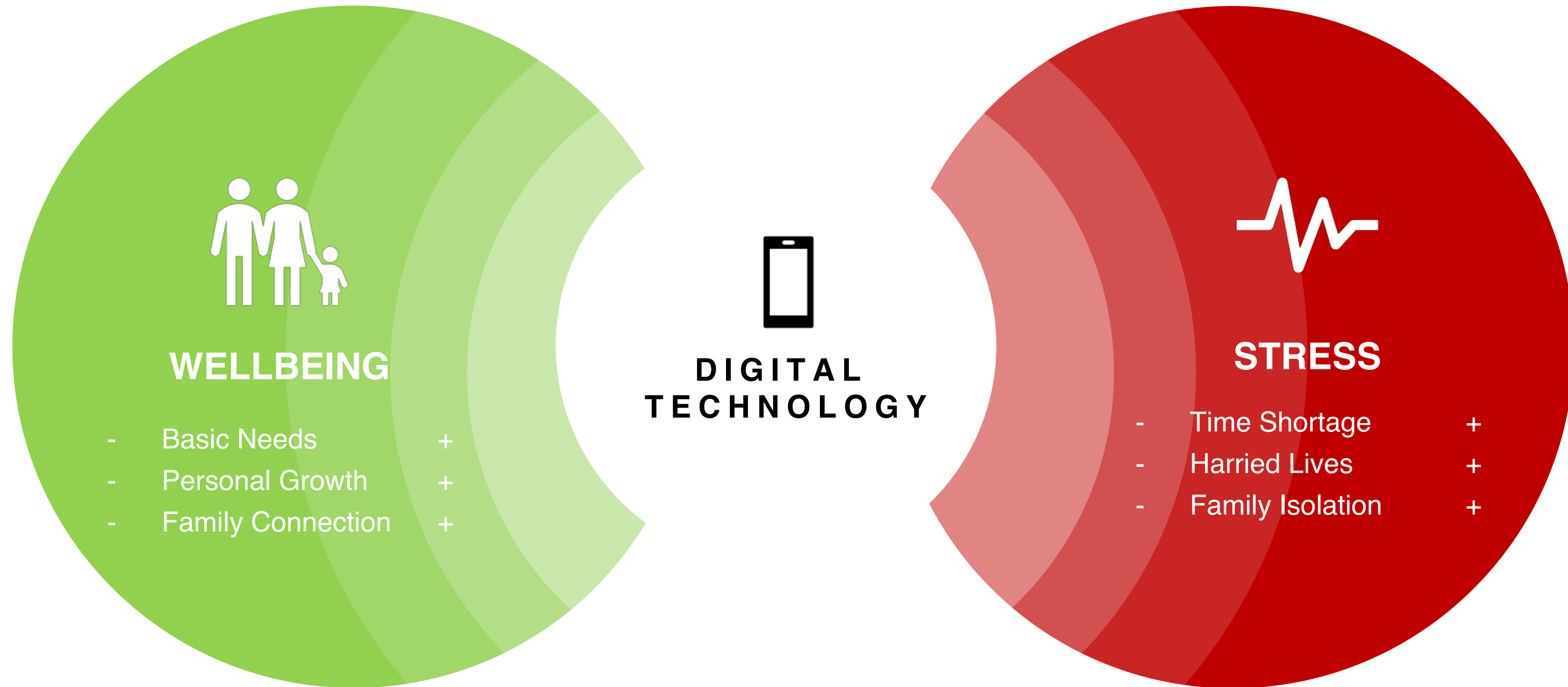
MITIGATION EFFECT

Digital technology alleviates stress but may also dampen the positive dynamics

UNIQUE CONTRIBUTION

Digital technology benefits families in a distinctive way; it also adds unique stress to families' lives

WELLBEING

- Basic Needs   +
- Personal Growth   +
- Family Connection   +

DIGITAL TECHNOLOGY

STRESS

- Time Shortage   +
- Harried Lives   +
- Family Isolation   +

Digital technology is integrated into every aspect of family life, contributing to both wellbeing and stress.

In this chapter, we will examine the following key dynamics where technology plays an important, if dichotomous, role:

- ✓ Safety vs Danger
- ✓ Productivity vs Waste
- ✓ Child's Healthy Development vs Developmental Harm
- ✓ Family Connection vs Family Isolation

SAFETY vs DANGER

Children's and family's safety is a fundamental concern of every parent. Digital technology both enhances families' sense of security and serves as a source of new worries and risks. It amplifies parents' and kids' natural predilections (e.g., enabling vigilant parents to keep tabs on their kids), mitigates risks (e.g., keeping kids away from rough neighborhoods), and adds unique benefits and risks (e.g., digital monitoring tools).
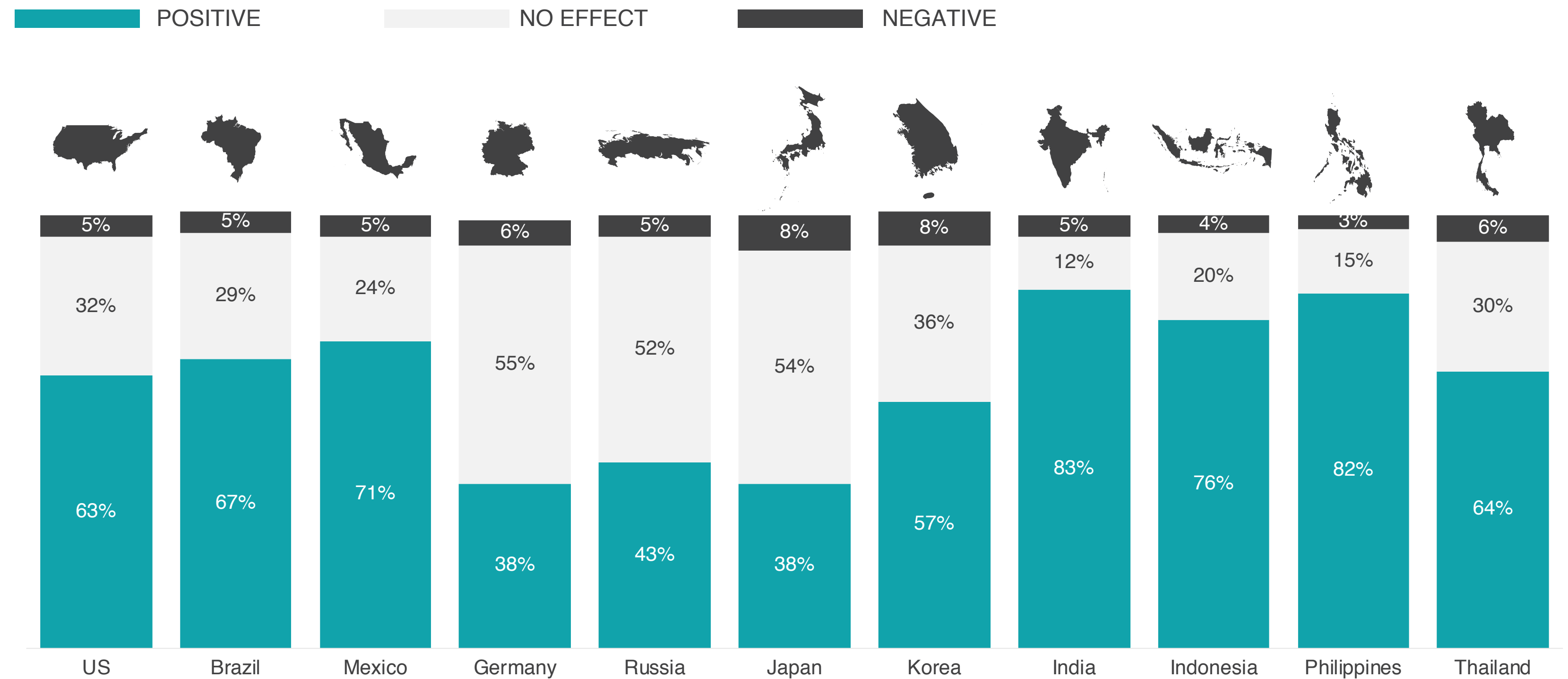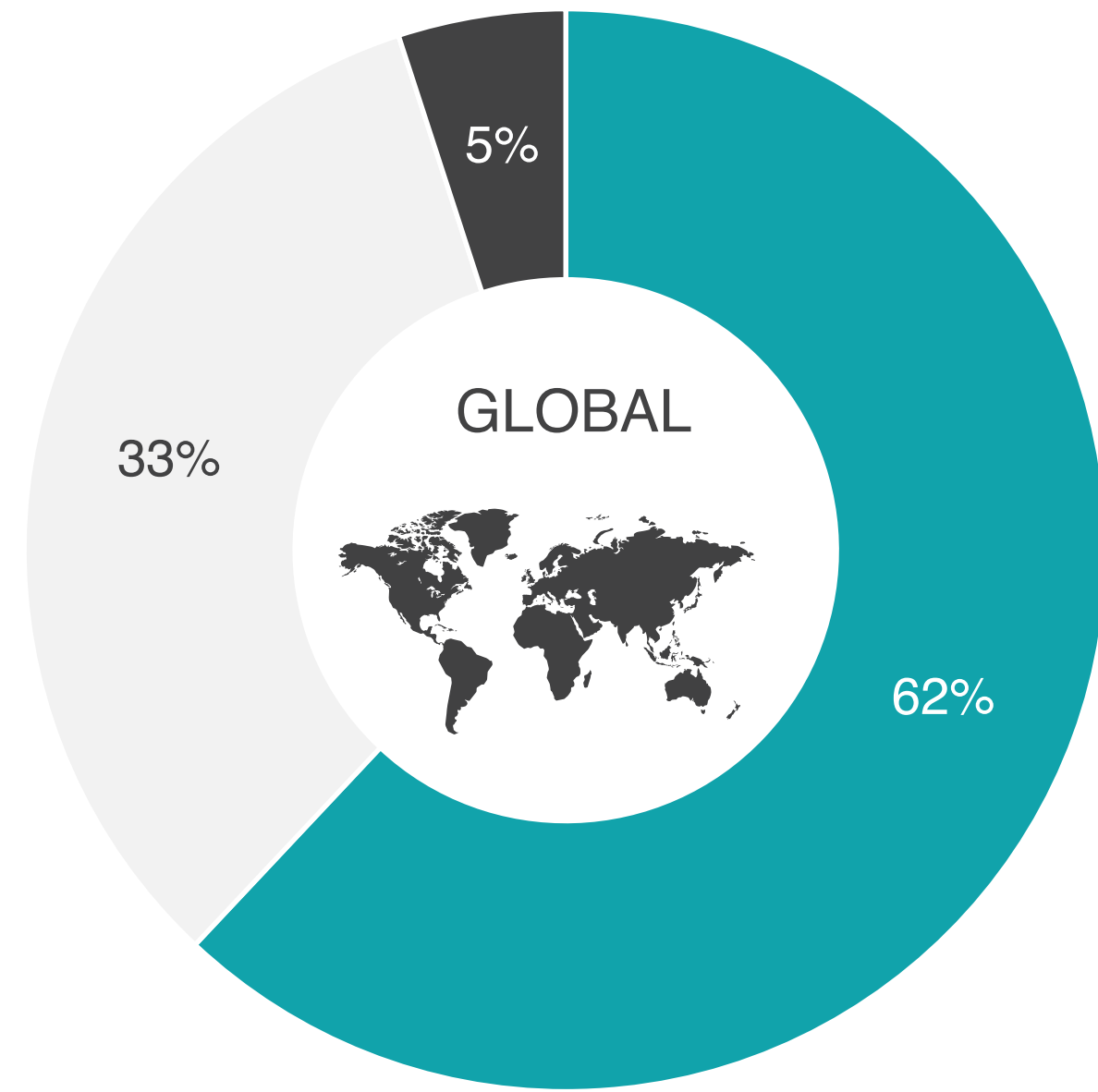
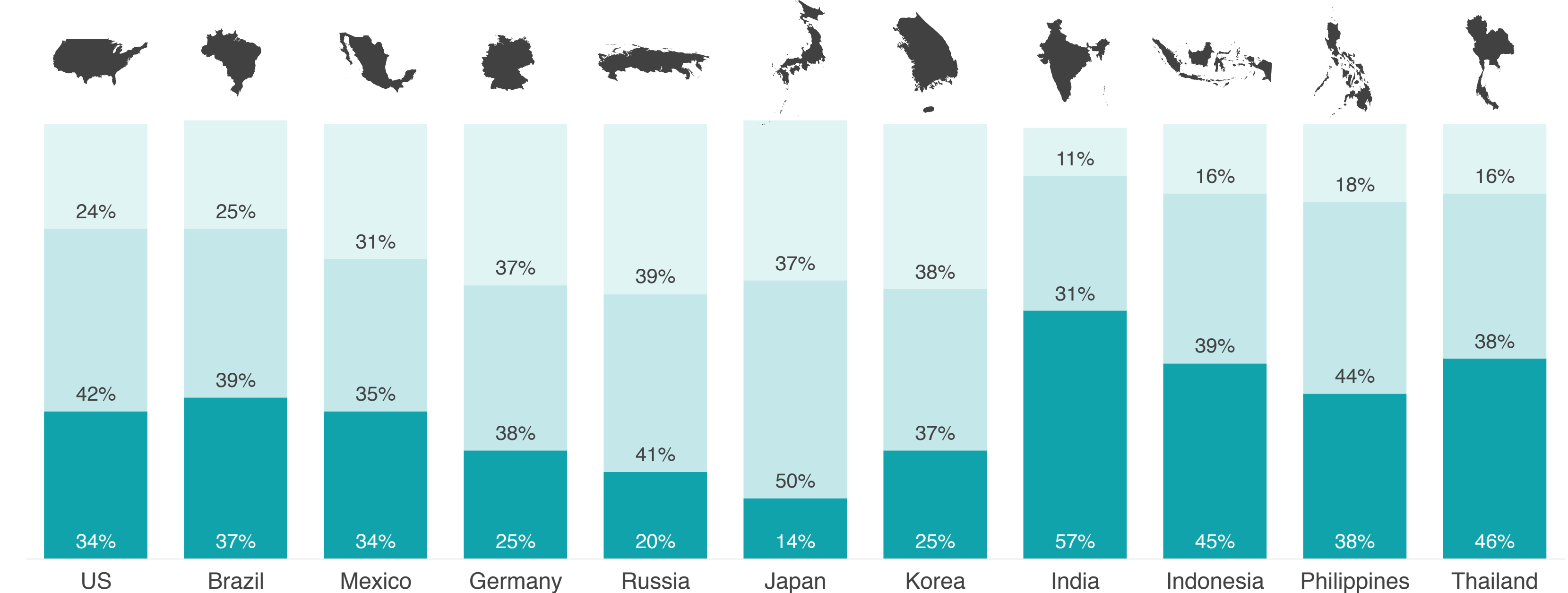|	**AMPLIFICATION EFFECT**	**MITIGATION EFFECT**	**UNIQUE CONTRIBUTION**
SAFETY	+ Enables more vigilance	- Opens the doors to the world	+ Constant accessibility + Geolocation + Monitoring tools
DANGER	- Enables risky behaviors	+ Keeps kids safe at home	- Exposure to inappropriate content - Trolling, social media bullying - Scams, online predators

Effect of digital technology on my family's safety

POSITIVE   NO EFFECT   NEGATIVE

GLOBAL

- 62%
- 33%
- 5%

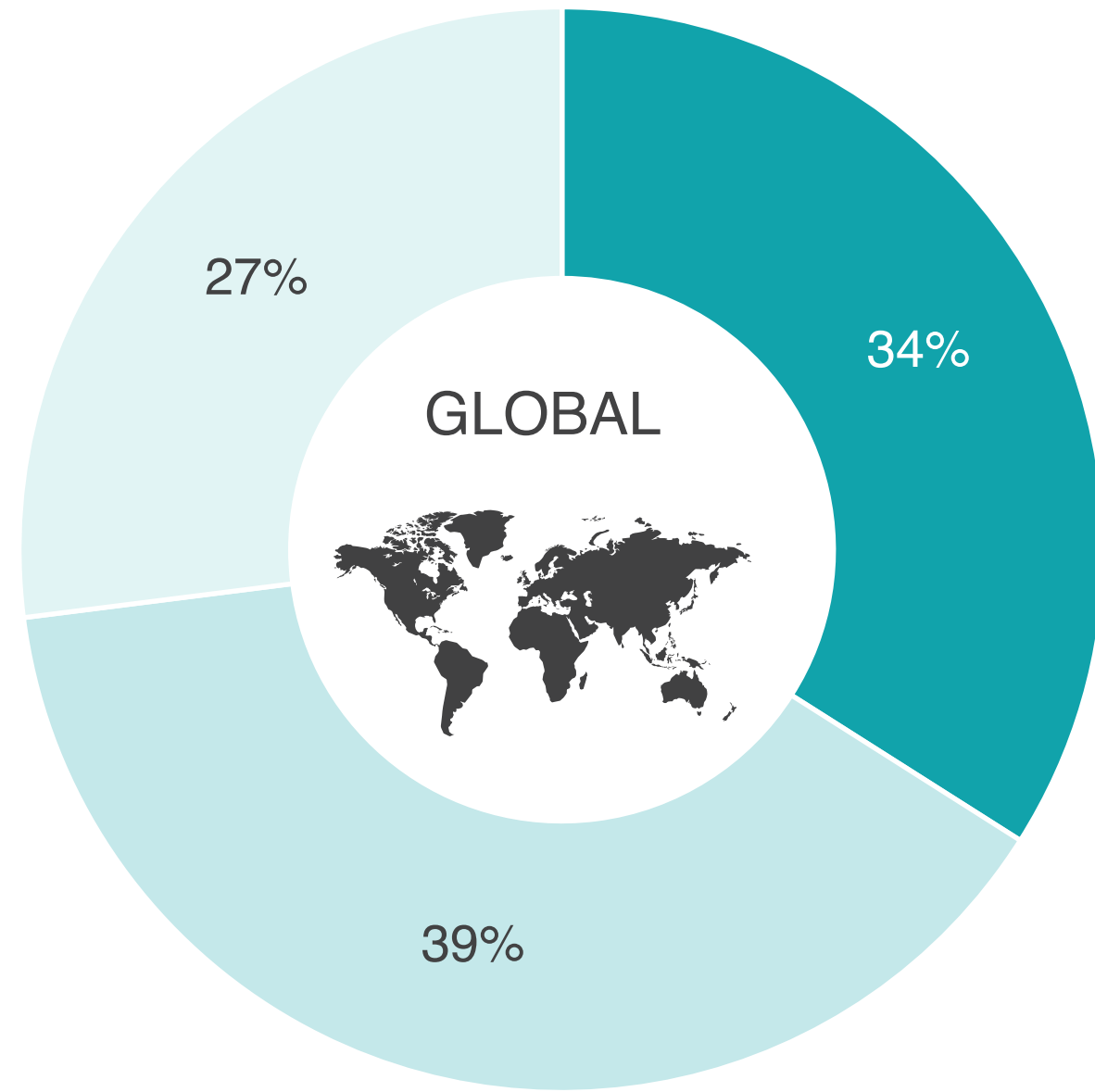|	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
NEGATIVE	5%	5%	5%	6%	5%	8%	8%	5%	4%	3%	6%
NO EFFECT	32%	29%	24%	55%	52%	54%	36%	12%	20%	15%	30%
POSITIVE	63%	67%	71%	38%	43%	38%	57%	83%	76%	82%	64%

THE ROLE OF TECHNOLOGY

SAFETY vs DANGER

The majority of parents in all countries, with the exception of Japan, Germany and Russia, believe that digital technology has a positive effect on safety of their families.

Notably, very few parents believe that digital technology has a negative effect on their family's safety.

OFTEN/ALL THE TIME   SOMETIMES   RARELY/NEVER

GLOBAL

- 34%
- 27%
- 39%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
RARELY/NEVER	24%	25%	31%	37%	39%	37%	38%	11%	16%	18%	16%
SOMETIMES	42%	39%	35%	38%	41%	50%	37%	31%	39%	44%	38%
OFTEN/ALL THE TIME	34%	37%	34%	25%	20%	14%	25%	57%	45%	38%	46%

THE ROLE OF TECHNOLOGY

SAFETY vs DANGER

Parents have diverse views on whether digital tech frequently helps their child stay safe.

While the majority of parents in India hold this view, only one-quarter or fewer parents hold this view in Japan, Russia, Germany or Korea.

ACCESSIBILITY

I use digital technology to keep in touch with my family at least once a day

GLOBAL
55%

DAILY

US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
48%	63%	62%	35%	53%	39%	61%	53%	66%	71%	55%

Smartphones have become lifelines between children and their parents. They provide an essential sense of security. They are now the obligatory means of staying in touch with children, keeping tabs on their whereabouts, and checking in with them.

What's more, many parents cannot imagine being without their devices for the purposes of reaching or keeping tabs on one another when apart. It plays a vital role in reassuring parents that their kids are OK when apart, or that they can be reached in an emergency.

The comfort this provides trumps the potential dangers from accessing inappropriate content or being scammed.

Being caught without a phone can even induce a sense of profound insecurity.

"

"That's the thing, security. As much as we want to take the tech away, but if we took our kids' phones, and they are out the house and you don't have a way to get ahold of them, it's like – my wife, "I can't get ahold of my son and he's not answering his phone, he left his phone, or his phone is dead." And she's freaking out."

FATHER OF 9-12 YEAR OLD

MONITORING AND GEOLOCATION

Digital technology has become an important tool for keeping tabs on children's location – either by using geolocation or other monitoring tools.

"iPhone has a tracking mechanism, so that way you know where they are."

FATHER OF 9-12 YEAR OLD

Digital devices have also become tools for home safety, through services and apps that allow families to remotely monitor their home.

"Just a few weeks ago, I was out on the West Coast, and I was traveling with someone, and apparently his children go through the garage when they get home from school, and they left the garage door open. He was notified on his phone that the garage door was left open. So, he's calling his kid on the East Coast saying "You left the garage door open." It's fascinating, I mean that's technology for you. It's pretty impressive."
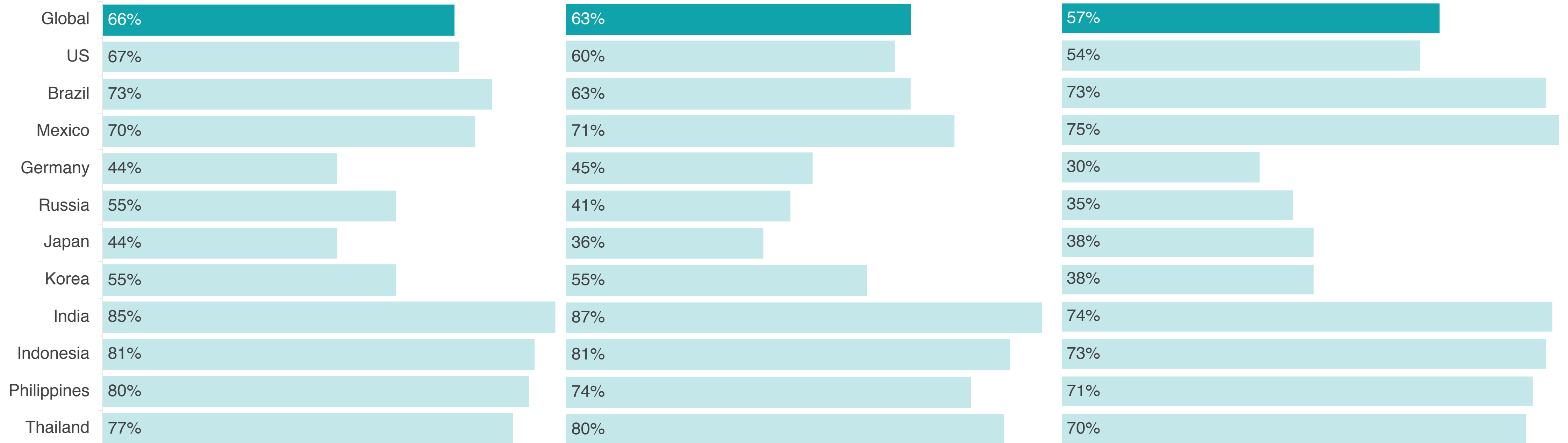
MOTHER OF 9-12 YEAR OLD

I use digital technology to help me know where my kids are and what they are doing (% always/often/sometimes)

Global	66%
US	67%
Brazil	73%
Mexico	70%
Germany	44%
Russia	55%
Japan	44%
Korea	55%
India	85%
Indonesia	81%
Philippines	80%
Thailand	77%

I keep track of where my child's is using geolocation (% ever)

Global	63%
US	60%
Brazil	63%
Mexico	71%
Germany	45%
Russia	41%
Japan	36%
Korea	55%
India	87%
Indonesia	81%
Philippines	74%
Thailand	80%

It's important that I use technology to keep track of my child's location (% agree)

Global	57%
US	54%
Brazil	73%
Mexico	75%
Germany	30%
Russia	35%
Japan	38%
Korea	38%
India	74%
Indonesia	73%
Philippines	71%
Thailand	70%

THE ROLE OF TECHNOLOGY: SAFETY VS DANGER

MONITORING AND GEOLOCATION

Digital technology makes parents feel more confident of their child's safety by keeping them aware of child's whereabouts.

TOOL FOR VIGILANT PARENTS

Monitoring tools enable parents with a predisposition for close control (like the proverbial "helicopter" parents)
to exercise even more vigilance over their children's online behaviors.

"

"I have access to all of their social media accounts. I set their passwords. I do not let them accept friend requests. I accept
them for them – if it's people they know. I monitor their Snapchat. My daughter's really the only one that has the social
media. My boys are more Xbox, but the Xbox accounts are through me. I get all the emails for anything they purchase… I've
done a few things where, one time, I had messaged my daughter from a different phone number. Just testing her. She came
running to me, like, 'Mom, this is weird.' I was like, 'He's seen your social media profile.' She was freaking out. I'm like, 'That
was me.' At different times, I'll test them."

MOTHER OF 13 -15 YEAR OLD
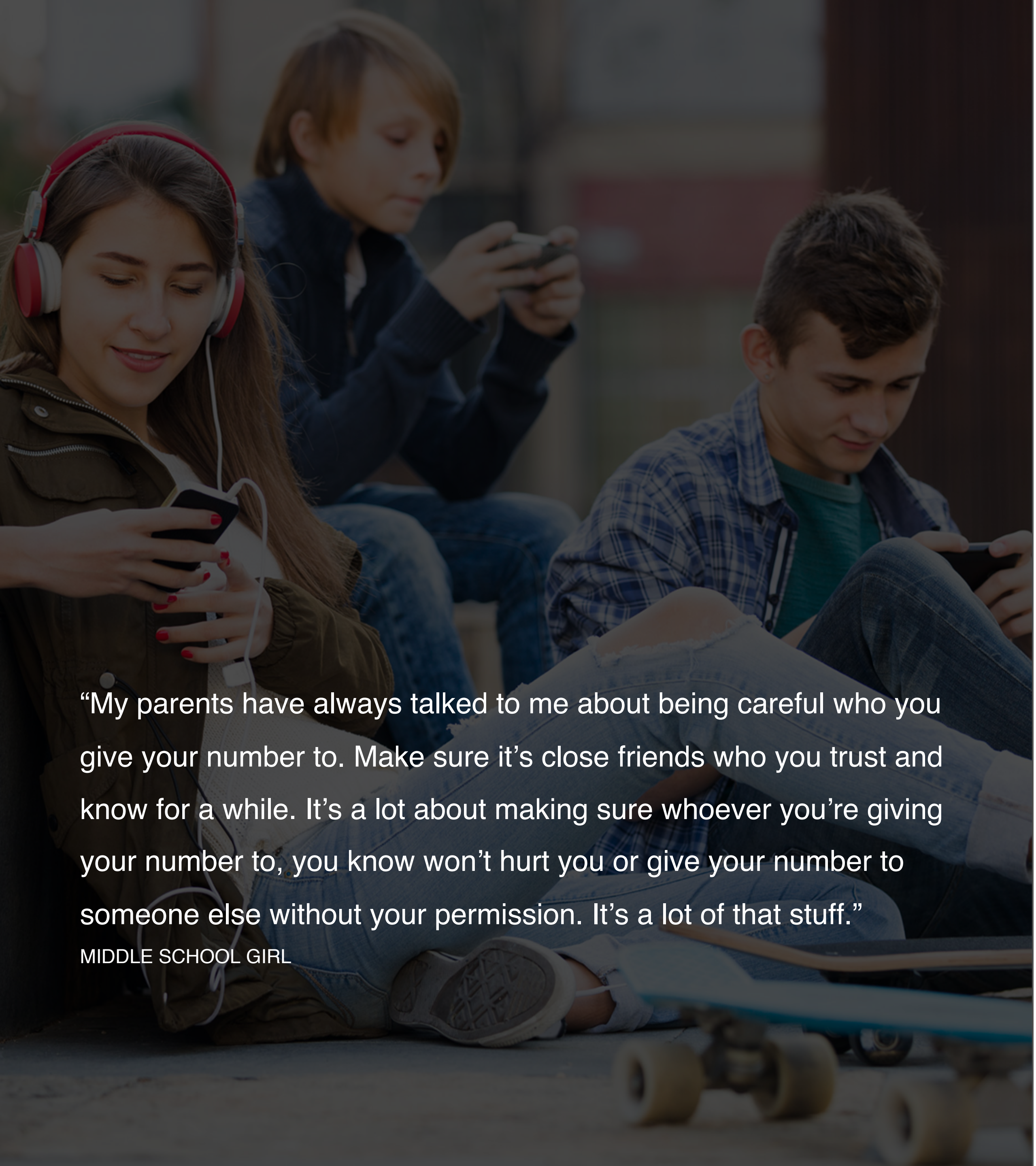
ONLINE DANGERS

Digital technology, however, also exposes children to potentially harmful content and safety concerns.

Parents are challenged to find ways to protect their children – even in their own homes – from bullying, online scams and trolling, and inappropriate content and language. The home is far less of a safe space when children are routinely online.

When their children begin to engage with social media, this can become a source of anxiety for parents, as they begin to worry about online bullying, obsession with accumulating followers and "likes," and possible effects on their children's emotional wellbeing.

Another major concern for parents and a common point of parent-child discussion is the danger of giving away information online that could be used against you – online scams, or potentially giving your name or location to an online predator.

"My parents have always talked to me about being careful who you give your number to. Make sure it's close friends who you trust and know for a while. It's a lot about making sure whoever you're giving your number to, you know won't hurt you or give your number to someone else without your permission. It's a lot of that stuff."
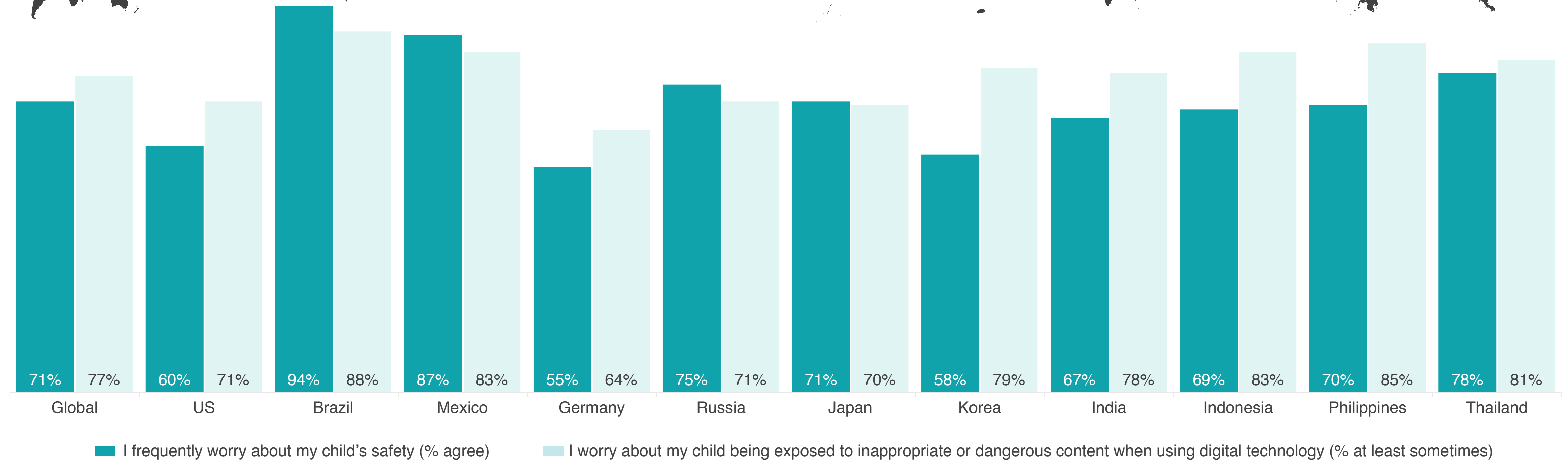
MIDDLE SCHOOL GIRL

THE ROLE OF TECHNOLOGY: SAFETY VS DANGER

"It's happened before. They're looking for something innocent and something pops up. They want to click on that and, especially a younger kid, you have to think of a clever way to explain what that is because you're not ready to have that conversation with them yet. "What do they mean by that?" One thing you have to worry about too is cyber crime. You've created this thing and now people are hacking into accounts. People are preying on our children. You have to worry about that."

MOTHER OF 6 - 8 YEAR OLD

	Global	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
I frequently worry about my child's safety (% agree)	71%	60%	94%	87%	55%	75%	71%	58%	67%	69%	70%	78%
I worry about my child being exposed to inappropriate or dangerous content when using digital technology (% at least sometimes)	77%	71%	88%	83%	64%	71%	70%	79%	78%	83%	85%	81%

THE ROLE OF TECHNOLOGY: SAFETY VS DANGER

ONLINE DANGERS

Concern about children's exposure to inappropriate or dangerous content is high across all countries.

Parents in Brazil and Mexico exhibit the highest levels of worry about their child's safety in general.

SAFE AT HOME

Technology also offers a safe alternative to risk behaviors and dangers lurking outside home. Some parents find solace in the fact that their child prefers video games or online content to hanging out with undesirable crowds in unsafe neighborhoods.

"She said there's not a lot of kids playing outside. The kids that play outside around my house are involved with drugs and stuff that I don't want my kids involved with. I'd much rather have a child who's in front of the television all day, versus outside smoking marijuana or doing worse stuff."

MOTHER OF 13 -15 YEAR OLD

PRODUCTIVITY vs WASTE

Families use digital technology for numerous productive purposes: to schedule and organize their family activities, shop, find bargains, research school projects, work from home, search for answers to their questions, learn new skills, try new recipes, and a myriad other tasks. Digital technology saves time and increases efficiencies, but it also often leads to distraction and, in some cases, addiction to digital activities.

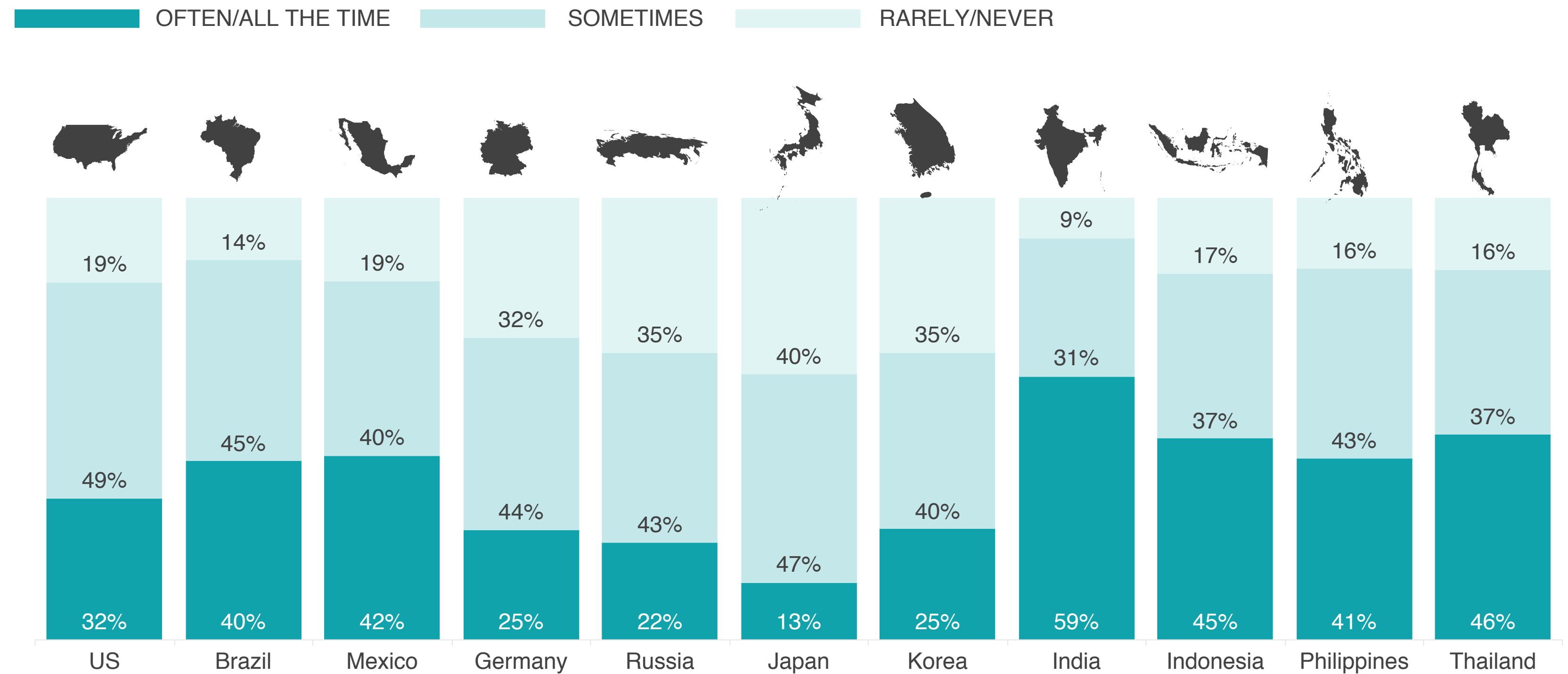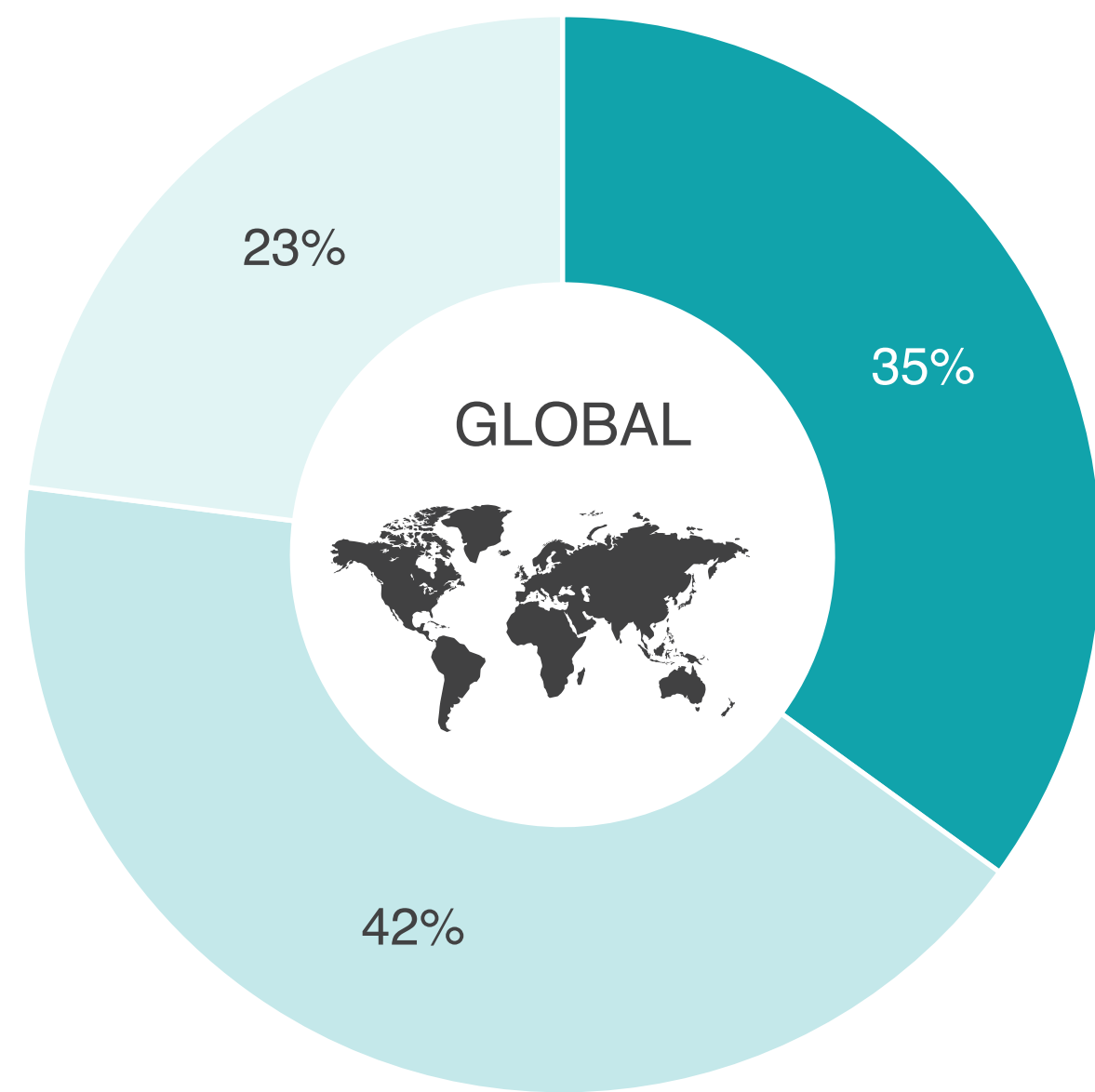|	**AMPLIFICATION EFFECT**	**MITIGATION EFFECT**	**UNIQUE CONTRIBUTION**
PRODUCTIVITY	+ Work from home + Increased productivity + Coordination of family events	- Constant access - Work around the clock	+ Scheduling and calendars + Organizing + Shopping and bargains + How-to and DIY
WASTE	- Being pulled into a rabbit hole - Waste of money on unnecessary deals	+ Time saved + Money saved on discounts	- Over-use - Addiction - Distraction
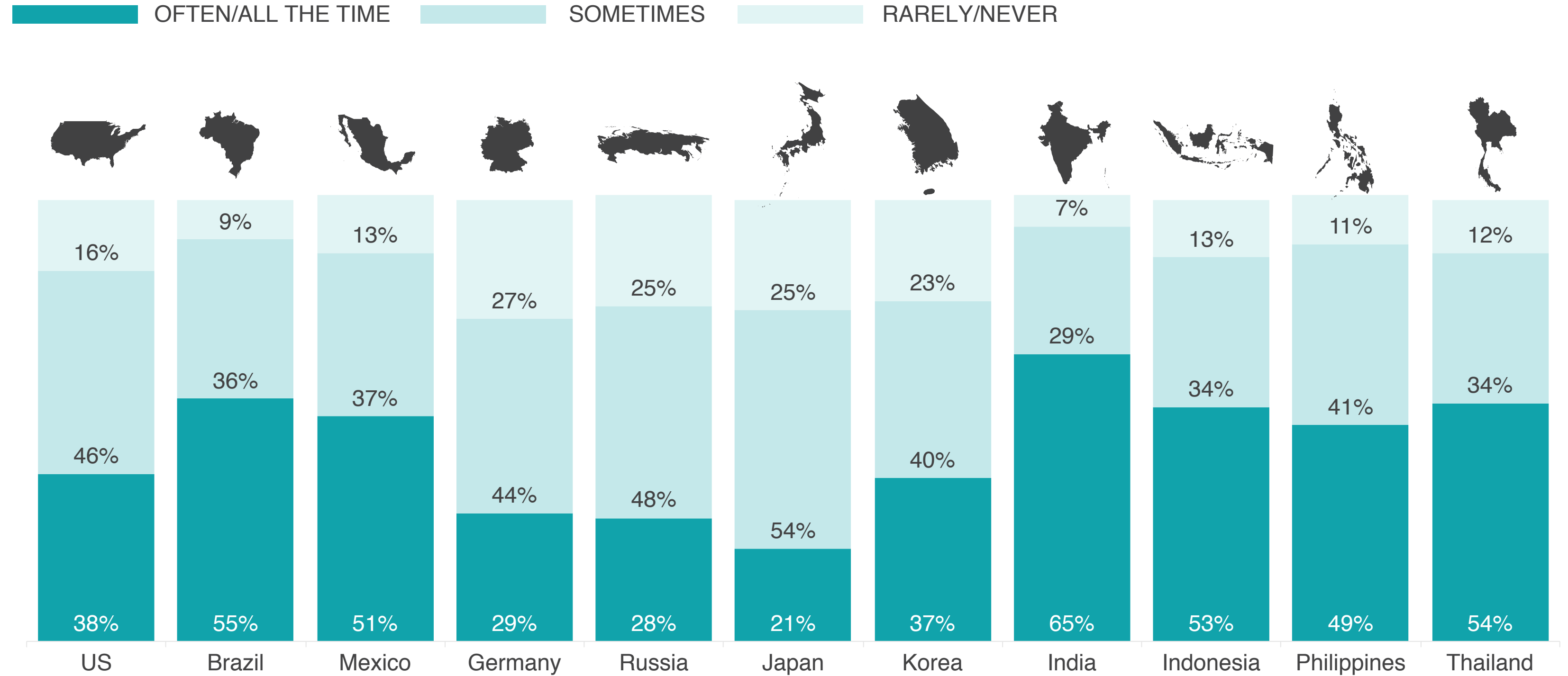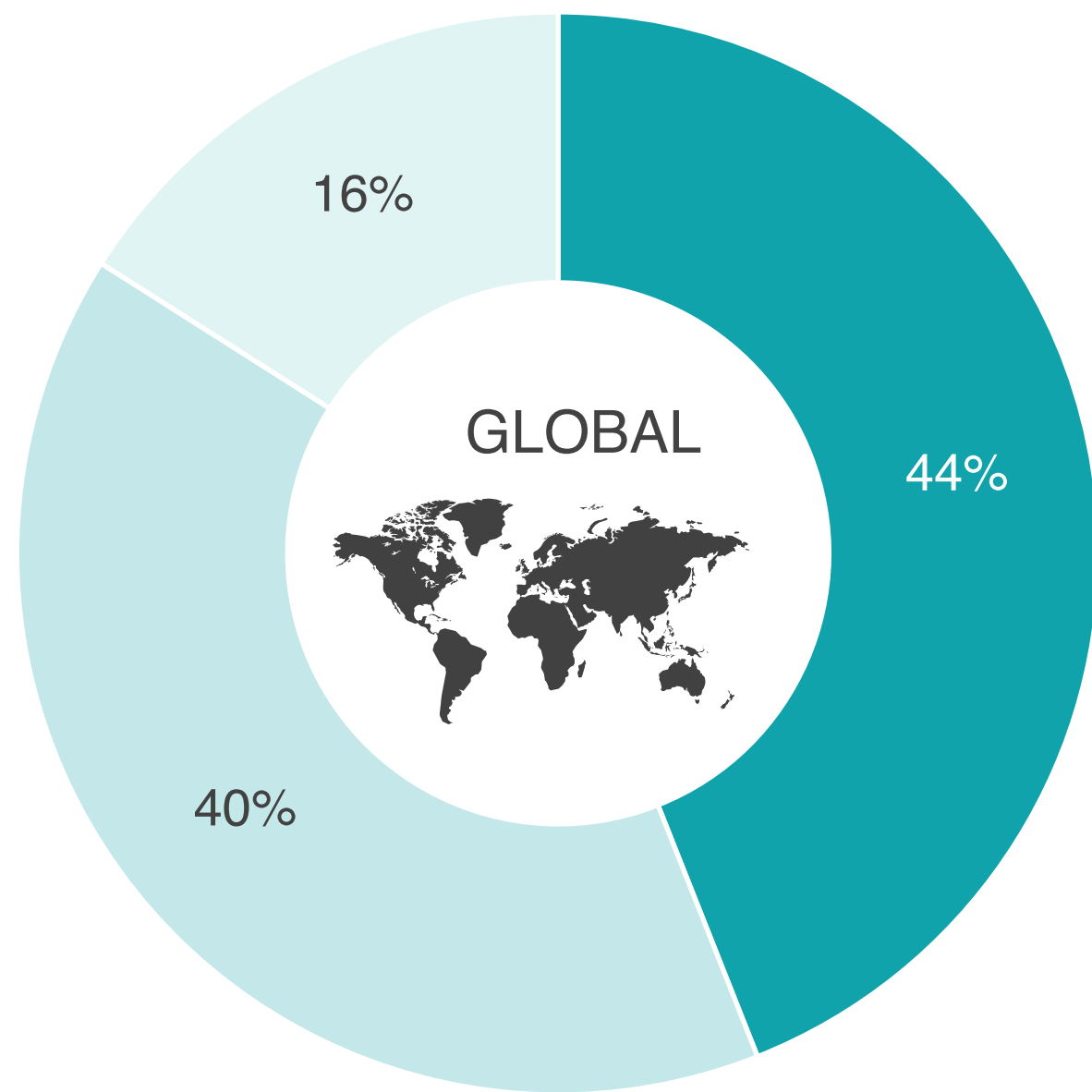
OFTEN/ALL THE TIME　　　SOMETIMES　　　RARELY/NEVER

GLOBAL

44%

40%

16%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
RARELY/NEVER	16%	9%	13%	27%	25%	25%	23%	7%	13%	11%	12%
SOMETIMES	46%	36%	37%	44%	48%	54%	40%	29%	34%	41%	34%
OFTEN/ALL THE TIME	38%	55%	51%	29%	28%	21%	37%	65%	53%	49%	54%

THE ROLE OF TECHNOLOGY

PRODUCTIVITY vs WASTE

Most parents believe that using digital technology is a productive use of their time, at least sometimes.

Parents in India are the most likely to believe digital technology is a productive use of their time.

Parents in Japan, Russia and Germany are the least likely to report this.

OFTEN/ALL THE TIME   SOMETIMES   RARELY/NEVER

GLOBAL

- 35%
- 42%
- 23%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
RARELY/NEVER	19%	14%	19%	32%	35%	40%	35%	9%	17%	16%	16%
SOMETIMES	49%	45%	40%	44%	43%	47%	40%	31%	37%	43%	37%
OFTEN/ALL THE TIME	32%	40%	42%	25%	22%	13%	25%	59%	45%	41%	46%

THE ROLE OF TECHNOLOGY

PRODUCTIVITY vs WASTE

Most parents believe that using digital technology is a productive use of their child's time, at least sometimes.

As in their views about productiveness of their own use, parents in India are the most likely to believe digital technology is a productive use of their child's time, while parents in Japan, Russia and Germany are the least likely to hold this view.

OFTEN/ALL THE TIME   SOMETIMES   RARELY/NEVER

GLOBAL

12%

49%

39%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
RARELY/NEVER	10%	7%	8%	15%	17%	26%	22%	5%	10%	5%	7%
SOMETIMES	43%	37%	34%	49%	37%	54%	41%	26%	34%	41%	35%
OFTEN/ALL THE TIME	47%	56%	58%	36%	47%	20%	37%	69%	56%	55%	58%

Note: Japan column also shows 26% (sometimes) and 54% separately.
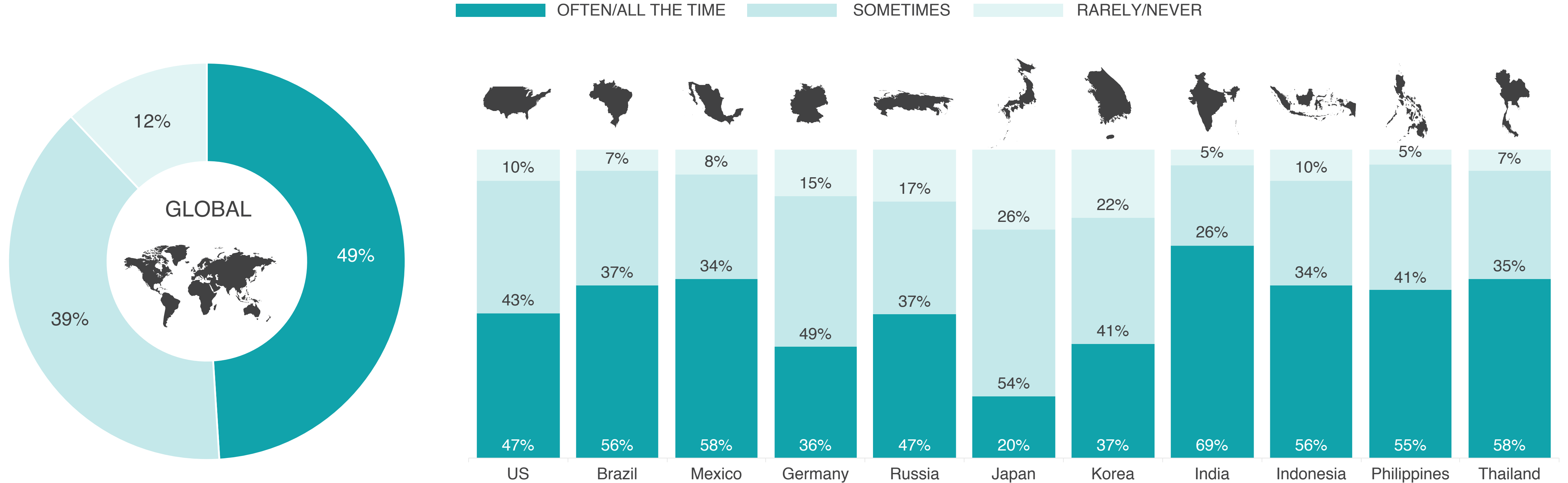
THE ROLE OF TECHNOLOGY

PRODUCTIVITY vs WASTE

Teens are even more likely than their parents to believe digital technology is a productive use of their time, at least sometimes.

In Russia, a significant gap exists between parents' and teens' perspectives on the value of digital technology. In contrast, families in India and Japan are more in sync.

Parents and teens in India the most likely and those in Japan are the least likely to say that digital tech is a productive use of their time.

% of parents who use digital technology at least once a week to…

	GLOBAL	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
Organize or schedule family tasks and events	52%	58%	53%	50%	40%	30%	31%	50%	71%	56%	61%	71%
Keep track of information about my child's school or school work	56%	58%	63%	62%	36%	56%	24%	39%	75%	72%	68%	70%
Shop online	52%	60%	46%	46%	49%	39%	28%	70%	68%	49%	54%	62%
Plan special events (birthdays, holidays)	36%	34%	39%	35%	33%	20%	16%	36%	54%	33%	40%	52%
Learn new skill or problem-solve (how-to or DIY)	61%	55%	63%	61%	40%	47%	38%	54%	79%	71%	80%	75%

THE ROLE OF TECHNOLOGY: PRODUCTIVITY VS WASTE

SCHEDULING AND ORGANIZATION

One of the tech benefits often cited by respondents was their reliance on it for scheduling and organizing family activities, for staying in touch with child's school and schoolwork, as well as for shopping.

THE ROLE OF TECHNOLOGY

"Even on the weekends, my wife is a calendar Nazi. My wife literally walks around the house talking to Alexa. She uses our Amazon Alexa to have the shopping list for the store. She'll add that in, just on her phone, so she has it. That plays a huge role. She loves using that. To keep our schedules. Because with guitar lessons and football, my other son has dance, it gets crazy sometimes."

FATHER OF 13-14 YEAR OLD

"I use different apps to find the better deals. The coupons, like Flip, Safeway app, Crazy coupon lady. I love her."

MOTHER OF 13-15 YEAR OLD

DISTRACTION

However, many parents believe their children spend too much time on their devices than is ideal. Some parents worry about "addiction" to digital devices. It is seen as particularly problematic when it interferes with homework, chores, or family time.

My child often/all the time…	GLOBAL	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
stays up late to use digital technology	**24%**	25%	30%	21%	20%	18%	17%	24%	37%	16%	25%	27%
skips meals to play videogames or use smartphone/tablet	**16%**	14%	17%	11%	12%	6%	11%	16%	31%	14%	14%	24%
wastes time using smartphone, tablet or videogame	**28%**	30%	40%	21%	26%	29%	18%	26%	34%	18%	26%	39%

"

"My 15-year-old – I heard some noise. Walked into his
room at two in the morning and he's got a tablet in
there watching YouTube videos. I'm like, 'Dude. You
took this out of my room without permission.' Stuff like
that. It's almost like an addiction."

FATHER OF 15 YEAR OLD
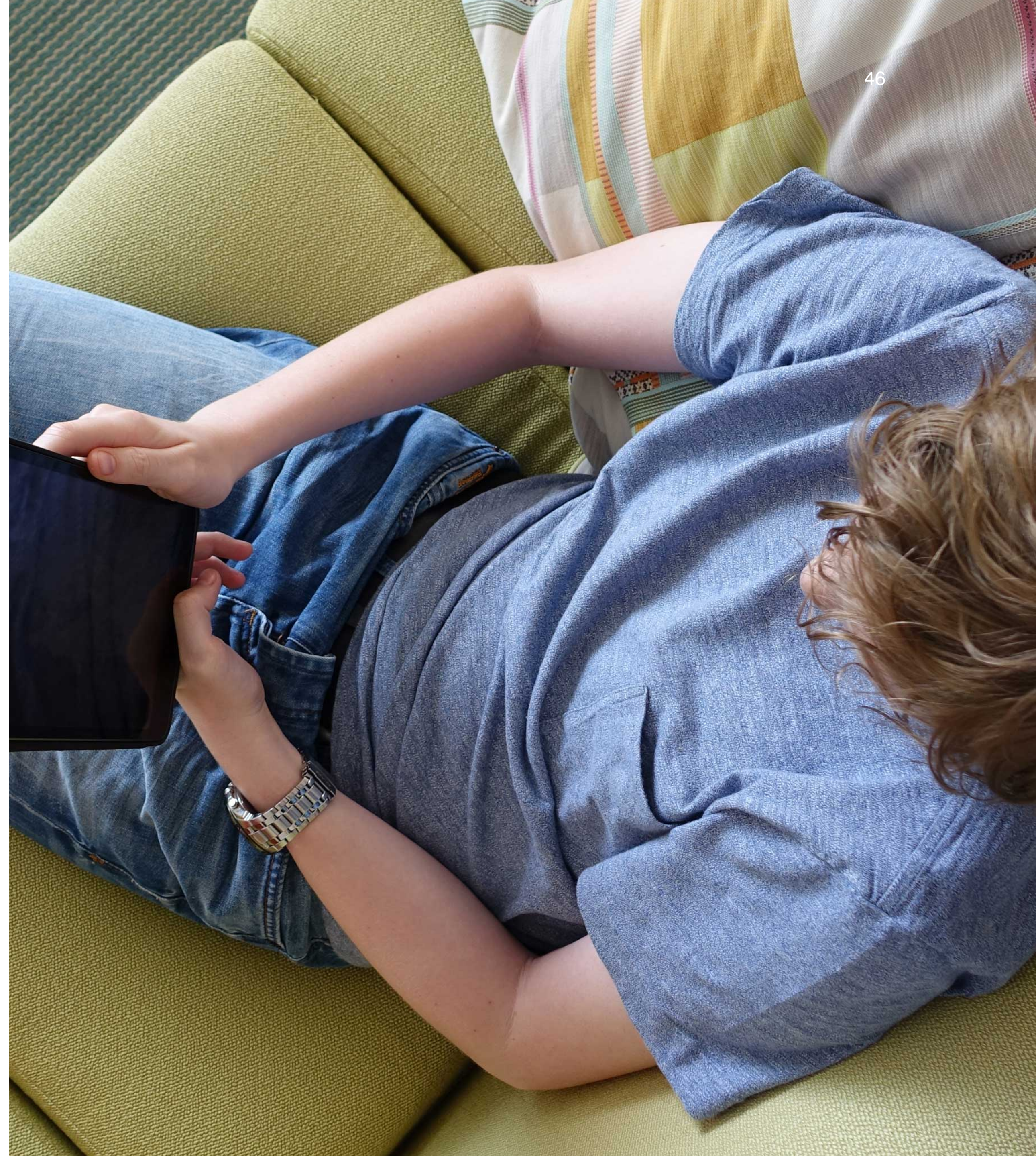
"I probably should cut back because it's not really good for you. There's a lot better things I could be doing like studying or working on some other project or playing with my brothers."

MIDDLE SCHOOL GIRL

KIDS ACKNOWLEDGE THAT THEY'VE GOT A PROBLEM

Many of the children interviewed were also highly aware of their own overuse.

"I feel like I would have to limit my time on video games because lately my grades have been dropping the more time I've been playing. I feel like I'm playing it too much, you know?"

MIDDLE SCHOOL BOY

DISTRACTION

Teens admit that they often waste time on digital activities.
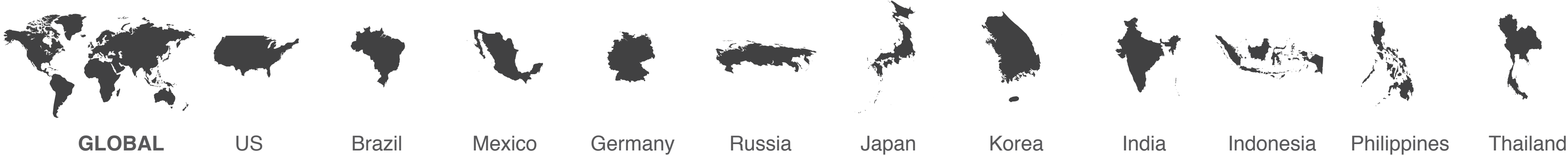
I often/all the time…	GLOBAL	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
stay up late to use digital technology	**30%**	31%	39%	27%	27%	27%	22%	30%	39%	20%	32%	37%
skip meals to play videogames or use smartphone/tablet	**16%**	14%	17%	11%	14%	6%	8%	17%	27%	19%	17%	27%
waste time using smartphone, tablet or videogame	**26%**	25%	45%	22%	22%	18%	14%	25%	33%	23%	24%	37%

PARENTS ARE CONCERNED THEIR CHILDREN ARE BECOMING ADDICTED TO DIGITAL TECHNOLOGY

Parents who worry all the time or often that their child is becoming addicted to digital technology

Global	39%
US	31%
Brazil	55%
Mexico	33%
Germany	24%
Russia	37%
Japan	27%
Korea	37%
India	47%
Indonesia	45%
Philippines	43%
Thailand	44%

"
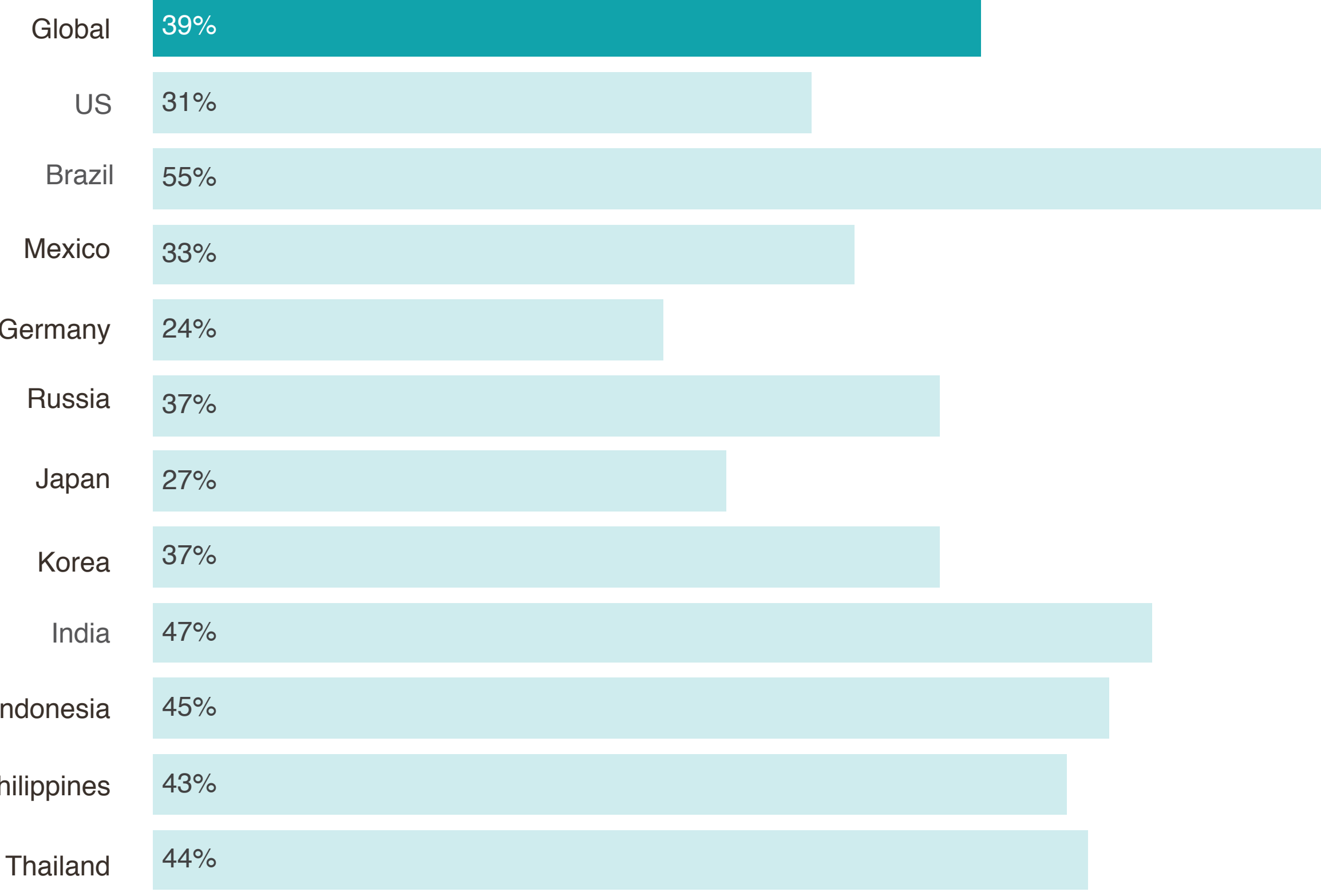
"She has the iPad and a Samsung Galaxy tablet. I'm terrible. She is constantly on it, like 13 hours a day. I started taking it from her at night because I would wake up and at 4:00 in the morning, her eyeballs would be glued to her tablet."

MOTHER OF 6-8 YEAR OLD

THE ROLE OF TECHNOLOGY

"It doesn't really work all the time – but I try to tell them during the week there is no electronics. Can you imagine? TV is OK. My older son gets obsessed with Fortnight – like obsessed where I tell him to look in the mirror at himself. I'm like, 'You need to calm down because you are like freaking out.' I took a video of him and he didn't know it. I was like 'Look at this video.' He was like 'Oh my God.' He laughs about it or whatever, but they really get addicted."

MOTHER OF 6-8 YEAR OLD

KIDS ACKNOWLEDGE THEIR SUSCEPTIBILITY TO DIGITAL ADDICTION

Kids and teens are aware of their propensity to get drawn into time-consuming wasteful activities on their devices. In interviews, teens described going down the rabbit hole on their devices, and losing track of time or anything else around them.

Country	Percentage
Global	24%
US	15%
Brazil	32%
Mexico	23%
Germany	15%
Russia	9%
Japan	12%
Korea	28%
India	37%
Indonesia	33%
Philippines	30%
Thailand	35%

Teens who worry all the time or often that they are becoming addicted to their smartphones

"
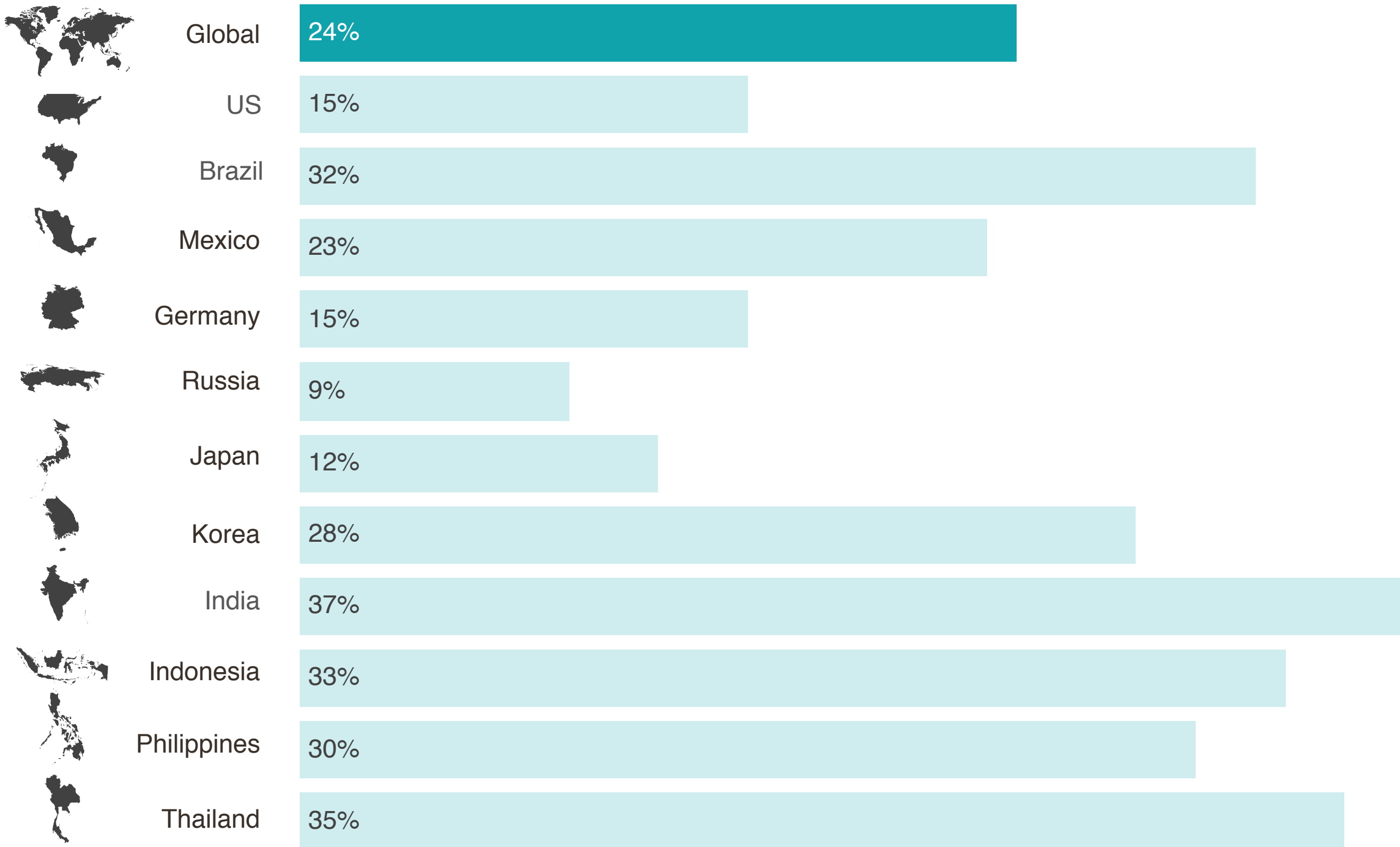
"You black out of the world and the only thing that you're paying attention to is your tablet or your phone or whatever you have."

MIDDLE SCHOOL GIRL

"I think almost every day there's a lot of stress. And I kind of blame technology; I blame cell phones. I'm guilty of it. I'm totally addicted to the cell phone and I'm always using it for business and everything else."

MOTHER OF 6-8-YEAR-OLD

PARENTS ARE COMPLICIT IN THEIR OWN ADDICTIVE BEHAVIORS

Parents often feel guilty about their own tech behaviors. Self-governance with respect to technology is a major issue for many of them. Respondents commonly expressed anxieties regarding their own usage, and admitted that they feel they are addicted to unproductive or time-wasting activities or games.

We heard again and again that before they can instill good technology engagement at home, they have to get their own act together.

"I'm involved a lot in technology. As far as being a role model, I'm lousy."

FATHER OF 13-15-YEAR-OLD

PARENTS WORRY ABOUT THEIR OWN AND THEIR SPOUSES' ADDICTION TO DIGITAL DEVICES

Global	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
31% 28%	27% 23%	47% 42%	32% 28%	23% 17%	20% 15%	18% 18%	26% 30%	40% 37%	39% 37%	32% 28%	36% 38%

■ Parents who worry all the time or often that their spouse is becoming addicted to digital technology   ■ Parents who worry all the time or often that they are becoming addicted to digital technology
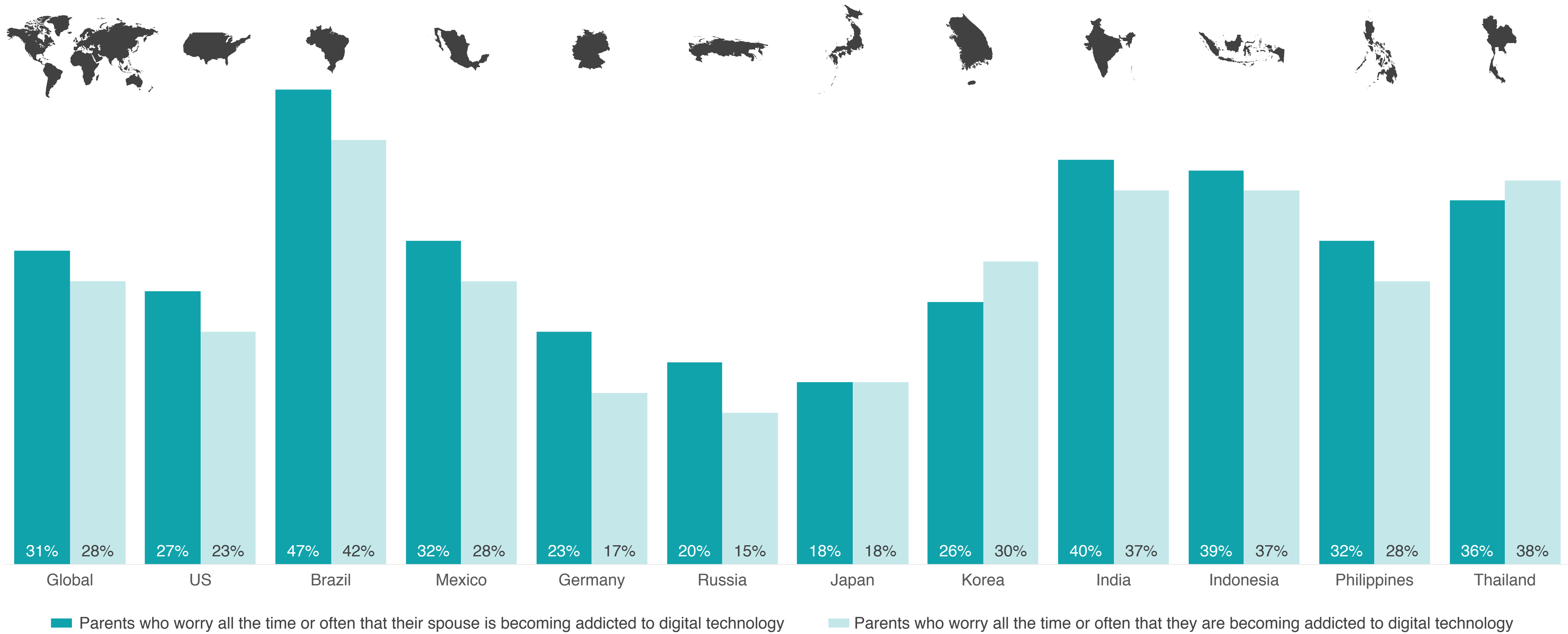
TALES OF ADDICTION

"

"Even if everyone is sleeping and it is 2 in the morning and I woke up for whatever – to get a drink or something, and then I go back on it [Groupon]. I just know that I will do it. I know it is time that I really should be sleeping. My alarm clock is going to ring at 5. I'll buy something. I'm like 'Did I really just buy that at 2 am this morning?' That's the worst shopping – the 2 am shopping."

MOTHER OF 2-5 YEAR OLD

"

"By the time I put my youngest on the bus, it is like 8:20. I don't work, so I end up sitting on Cookie Jam or Amazon until my kids – my older ones get off the bus about 2:20. I will throw my phone down and then I'll change because I'm still in the same clothes. Then I will run around and pretend like I cleaned something. If I'm like doing something on Cookie Jam, I will run into the bathroom and I'll be like 'I'll be with you in a minute' just so I can finish my game. It's terrible. I'm terrible. My kids are like 'Were you really on your phone all day?' I'm like 'No.' I don't want them to think I'm a big loser and spent 8 hours. That's terrible. I'm totally addicted to this game."

MOTHER OF 2-5 AND 9-12 YEAR OLDS

PARENTS' BEHAVIOR IS NOT LOST ON THEIR KIDS

Parents' addictive digital behavior does not go unnoticed by their children, who often feel resentment at what they see as a double-standard.

Teens who worry all the time or often that their *parents* are becoming addicted to digital technology

Country	%
Global	20%
US	15%
Brazil	29%
Mexico	20%
Germany	13%
Russia	6%
Japan	12%
Korea	21%
India	33%
Indonesia	27%
Philippines	19%
Thailand	29%
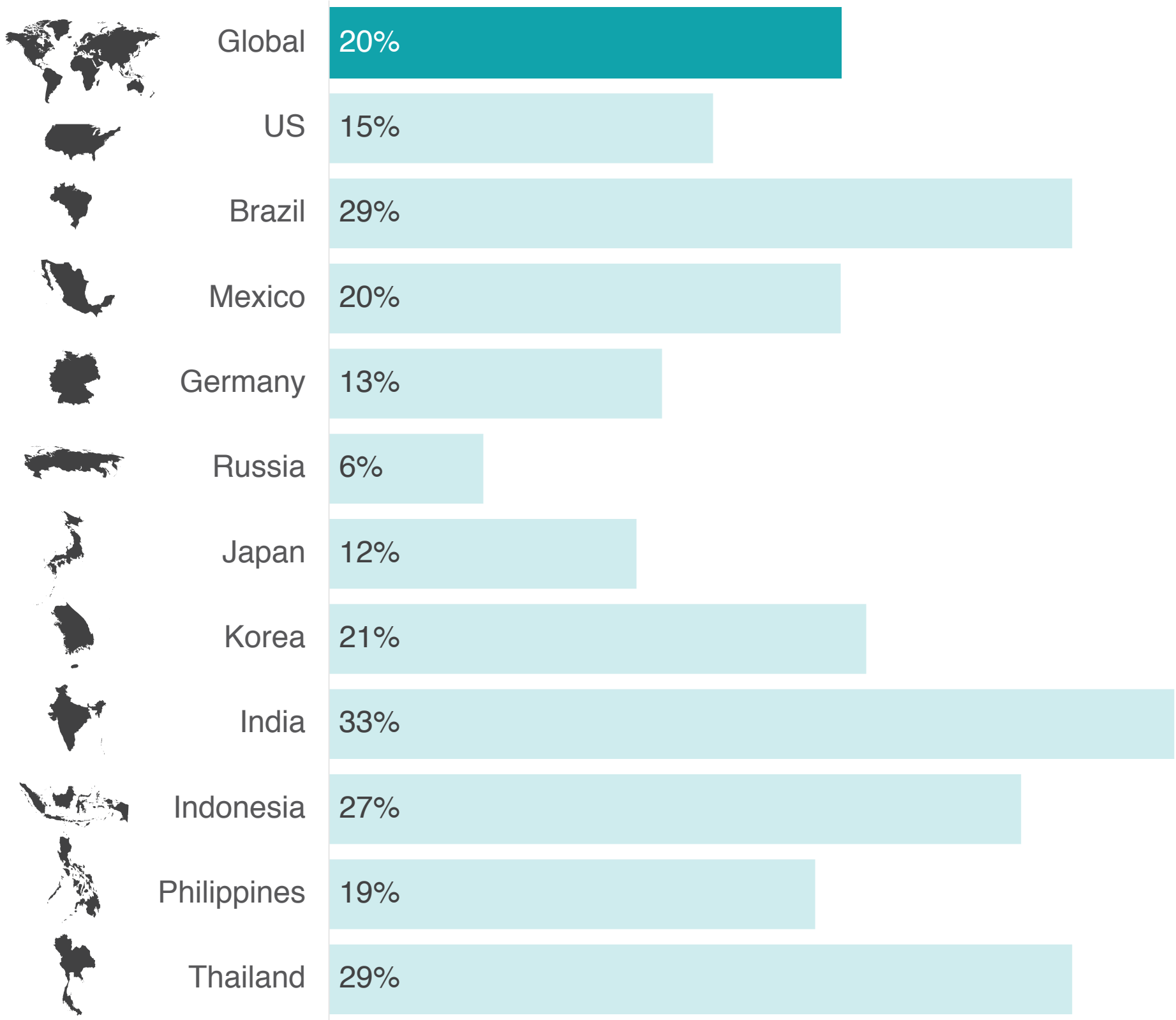
"When we're sitting at dinner my mom always looks on her phone. When I have something, I need to say it over and over again, and she tells me to go to bed just because she wants to go on her phone."

ELEMENTARY SCHOOL BOY

"I think both my parents are pretty addicted to their phones. My dad gets his peace and quiet so he'll go outside and be on his phone. My mom, she'll be in the room laying down. All you hear is the little clicking sound for the tapping. I say, 'Mom. Mom. Mom.' I repeat myself and she's like, 'What? What? What?'"

MIDDLE SCHOOL GIRL

KIDS ARE RESENTFUL OF PARENTS' HYPOCRISY

The hypocrisy of parents trying to limit their children's tech engagement while putting no limit on their own is evident to kids.

"

"Why do you guys get as much as you want on your phone and I get a little bit of time on my tablet?' They'll say, 'Because I'm an adult.' It makes me feel mad, but still sad because they won't listen to their own voice when they say it."

MIDDLE SCHOOL GIRL

"

"Sadly, my mom texts and drives sometimes. I always tell her to put the phone down and she's like 'I will. I will.' And then she picks it up two minutes later to text relatives or whatever."

MIDDLE SCHOOL BOY

"

"Like at restaurants, I just need to put my phone down, because she taught me before that was disrespectful. And now, she's a hypocrite because she's always on her phone. I'm like, 'Mom' and she's like, 'Yeah? What did you say? Did you say something?' She's very distracted."

MIDDLE SCHOOL BOY

HEALTHY DEVELOPMENT vs DEVELOPMENTAL HARM

Digital Technology is widely perceived to contribute to children's cognitive development, helping them gain knowledge and skills and exposing them to the wider world.

However, parents express concern over its impact on their social skills, on their ability to focus and sustain their attention, and on their physical health.

	AMPLIFICATION EFFECT	**MITIGATION EFFECT**	**UNIQUE CONTRIBUTION**
HEALTHY DEVELOPMENT	+ Learning + Mastery + Confidence + Empowerment	- Ability to focus and sustain attention - Resourcefulness	+ Knowledge and skills + Research + Exposure to the world + Tech literacy
ISOLATION	- Physical (eyesight, fitness) - Indoor seclusion - Social and communication skills	+ Online friendships	- Supplants physical activity - Impedes social interactions - Becomes socially normative

What effect does digital technology have on your child's social life?

GLOBAL

- POSITIVE
- NO EFFECT
- NEGATIVE

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
NEGATIVE	7%	9%	10%	11%	9%	13%	14%	7%	13%	9%	9%
NO EFFECT	38%	24%	30%	49%	43%	52%	32%	14%	15%	13%	29%
POSITIVE	55%	67%	60%	40%	48%	34%	54%	79%	72%	78%	62%

Global: Negative 10%, No Effect 31%, Positive 59%
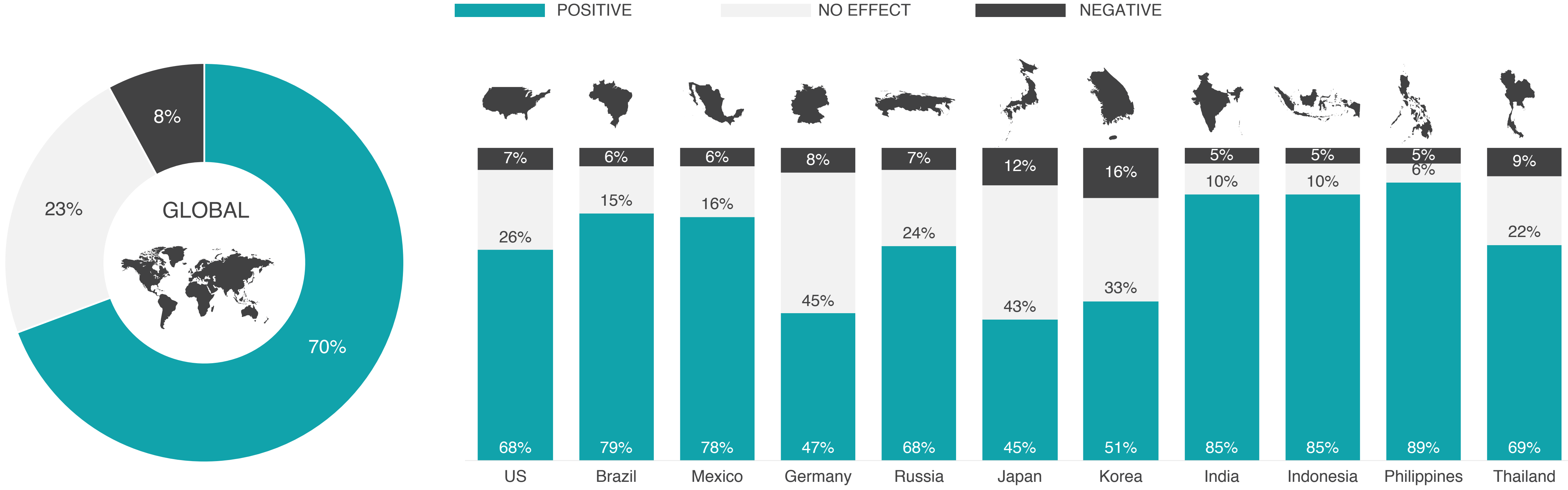
THE ROLE OF TECHNOLOGY

HEALTHY DEVELOPMENT VS DEVELOPMENTAL HARM

The majority of parents in most countries also believe in the positive impact of digital technology on their child's social life.

Parents in India, Indonesia and the Philippines are the biggest proponents of digital tech's positive impact on their child's social life, while those in Japan, Germany and Russia are the most skeptical.

What effect does digital technology have on your child's emotional wellbeing?

POSITIVE | **NO EFFECT** | **NEGATIVE**

GLOBAL

12%
31%
57%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
NEGATIVE	9%	6%	9%	10%	22%	11%	25%	7%	13%	11%	13%
NO EFFECT	40%	20%	31%	52%	35%	48%	35%	16%	20%	15%	29%
POSITIVE	52%	74%	60%	39%	43%	41%	41%	77%	67%	75%	58%
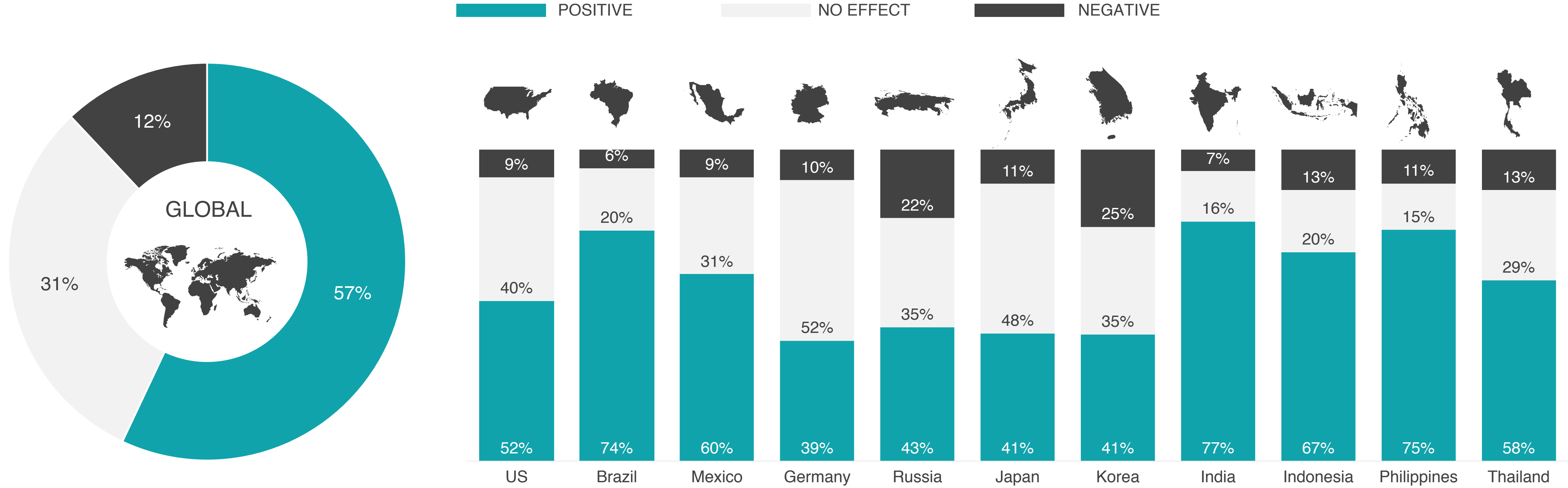
THE ROLE OF TECHNOLOGY

HEALTHY DEVELOPMENT VS DEVELOPMENTAL HARM

There is less consensus among parents about the positive impact of digital technology on their child's emotional wellbeing.

In Germany, Russia, Japan and Korea, fewer than half of parents believe digital technology has a positive effect on their child's emotional wellbeing.

Furthermore, in Korea and Russia nearly one in four parents believe that digital technology has a negative effect on this area of their child's development.

LEARNING AND MASTERY

"

"They learn a lot of skills on there – or learn a lot about different things. We'll be talking about something. They're like, 'Oh, yeah.' I go, 'How do you know that?' 'I learned it online.' They're still learning a lot from what they're watching. I'm sure they're learning a lot of stuff that they don't need to be learning, but they are learning useful things as well."

MOTHER OF 6-9 YEAR OLD

Parents view digital technology as providing a major new avenue for learning and mastery for children: for education, for self-expression, for learning about the world, and for preparation for their own tech-immersed futures.

_____

"Everything they want to know – 'Let me look online.' It's information at their fingertips all the time. It's better than what we had."

MOTHER OF 13-15 YEAR OLD

_____

"I think technology brings a different approach to learning than, say, a book. My five-year old is not going to pick up a book and start reading something. But he'll go on his ABC Mouse app that we have. He'll learn on there, because of the different colors and the characters."

MOTHER OF 2-5 YEAR OLD

THE ROLE OF TECHNOLOGY

PREPARING FOR THE FUTURE

Tech literacy is commonly seen by both parents and kids as a necessary skill, a fundamental need for creating future opportunities, and a viable avenue to financial security.

"I'm trying to be real about it because I know the world is full of technology, and I want them to be on top of it because they can

have the best jobs. If they don't know technology, when it's time to get into the world they won't know what to do, and they're

going to be behind the times because everything is evolving so fast, so I kind of want them to stay up with it."

MOTHER OF 9-12-YEAR-OLD
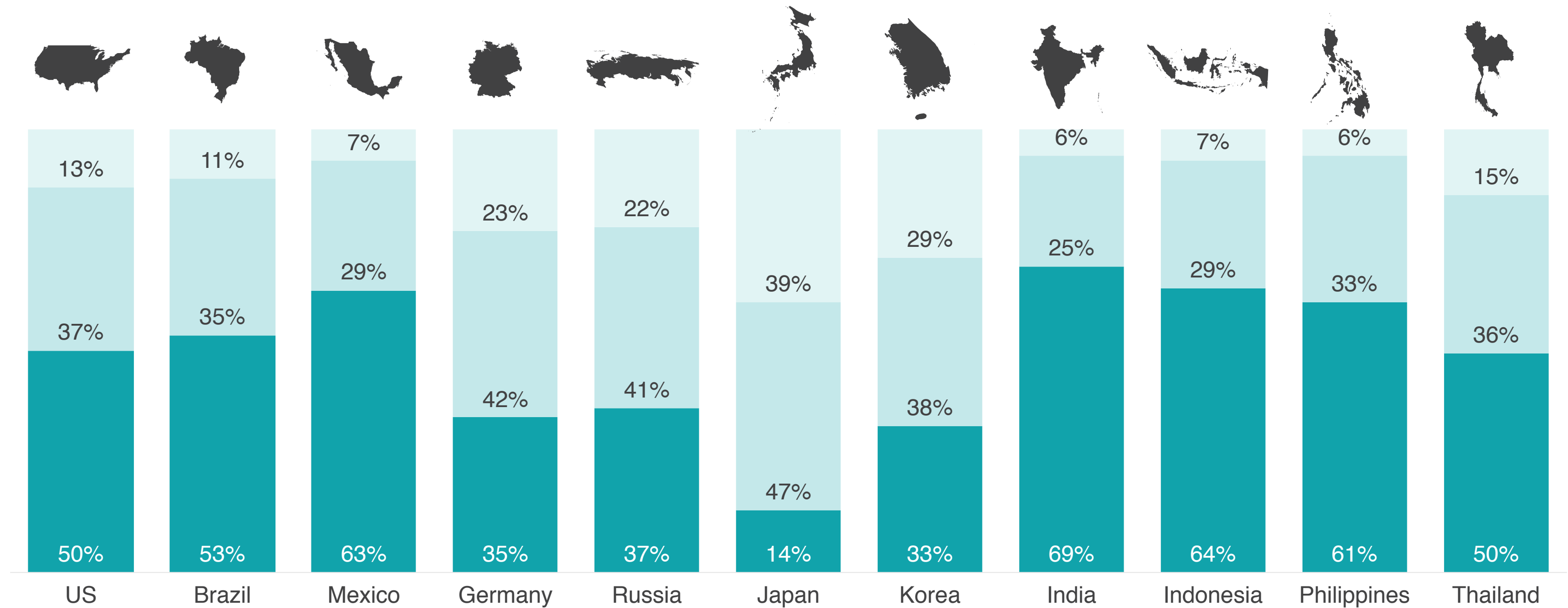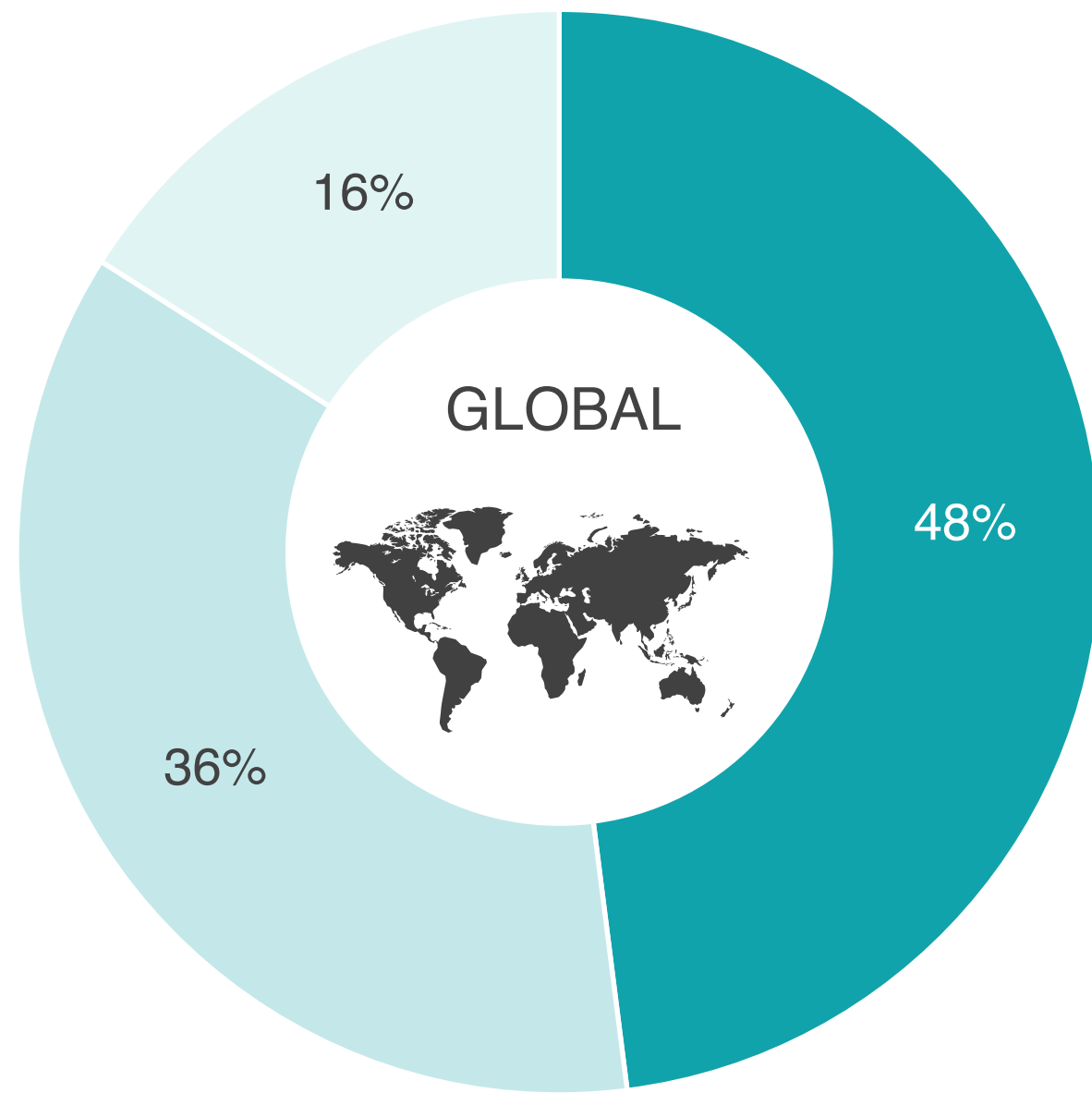
PARENTS: Digital technology helps my child succeed with schoolwork

OFFEN/ALL THE TIME   **SOMETIMES**   **RARELY/NEVER**

GLOBAL

48%
36%
16%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
Rarely/Never	13%	11%	7%	23%	22%	39%	29%	6%	7%	6%	15%
Sometimes	37%	35%	29%	42%	41%	47%	38%	25%	29%	33%	36%
Often/All the time	50%	53%	63%	35%	37%	14%	33%	69%	64%	61%	50%

THE ROLE OF TECHNOLOGY HEALTHY DEVELOPMENT VS DEVELOPMENTAL HARM

LEARNING AND MASTERY

The majority of parents in most countries surveyed believe that using digital technology frequently helps their child do well at school.

The notable exceptions are Japan, Korea, Germany and Russia.

PARENTS: Digital technology helps my child gain knowledge and skills
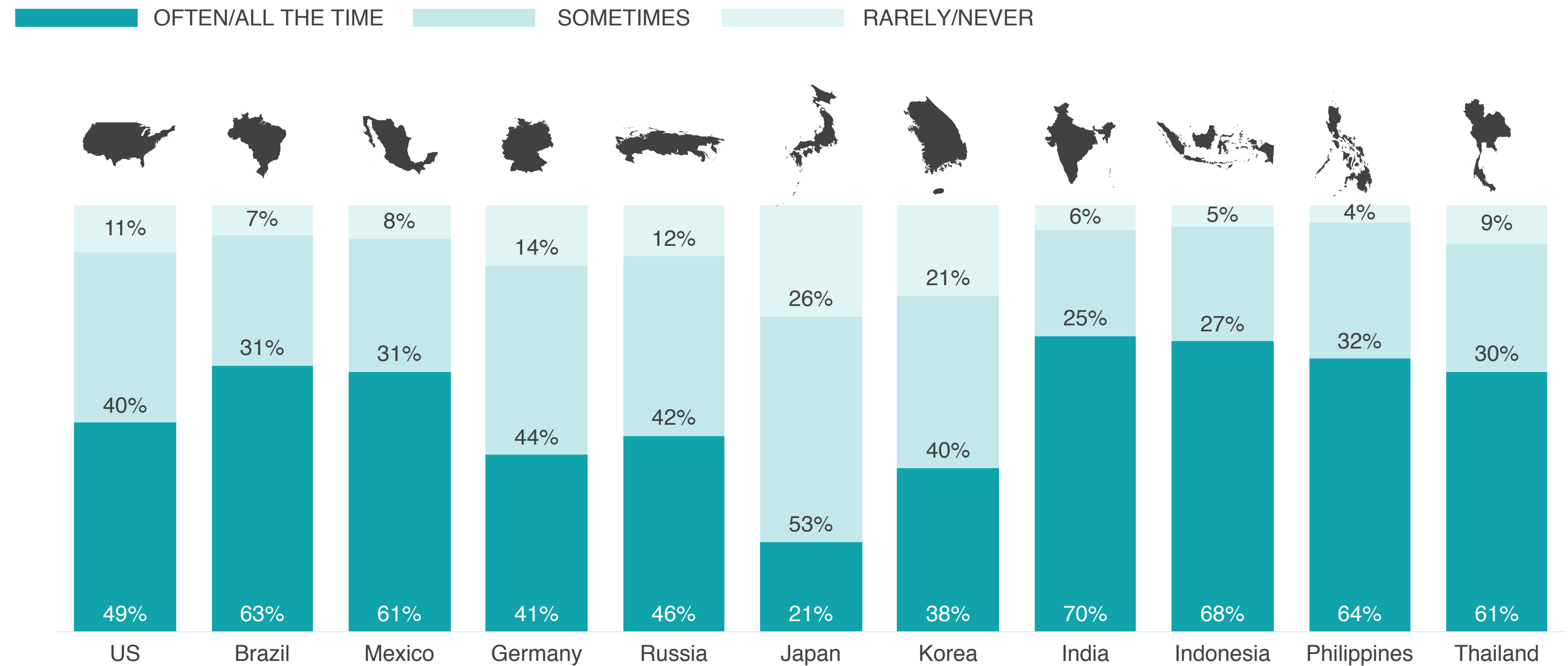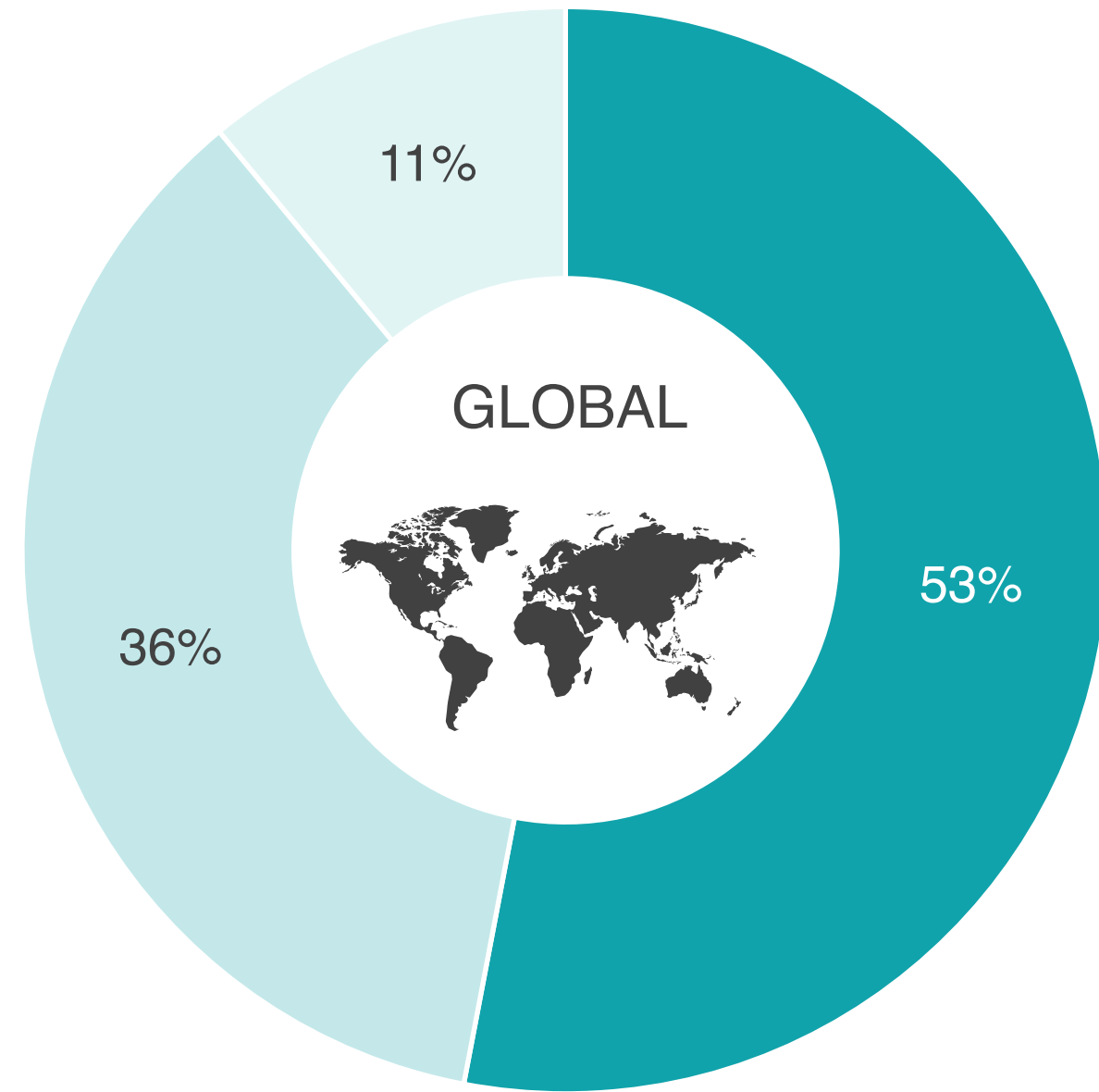
OFTEN/ALL THE TIME   SOMETIMES   RARELY/NEVER

GLOBAL

- 53%
- 36%
- 11%

Country	RARELY/NEVER	SOMETIMES	OFTEN/ALL THE TIME
US	11%	40%	49%
Brazil	7%	31%	63%
Mexico	8%	31%	61%
Germany	14%	44%	41%
Russia	12%	42%	46%
Japan	26%	53%	21%
Korea	21%	40%	38%
India	6%	25%	70%
Indonesia	5%	27%	68%
Philippines	4%	32%	64%
Thailand	9%	30%	61%

THE ROLE OF TECHNOLOGY HEALTHY DEVELOPMENT VS DEVELOPMENTAL HARM

LEARNING AND MASTERY

The majority of parents believe that using digital technology helps their child gain knowledge and skills at least sometimes.

Parents in Japan are the least likely to hold this view.

PARENTS: Digital technology helps my child pursue his/her interests

OFTEN/ALL THE TIME   SOMETIMES   RARELY/NEVER

GLOBAL

13%
37%
49%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
RARELY/NEVER	13%	8%	13%	19%	19%	19%	21%	8%	7%	9%	9%
SOMETIMES	41%	31%	32%	43%	43%	55%	40%	26%	33%	38%	28%
OFTEN/ALL THE TIME	46%	61%	55%	37%	38%	27%	39%	65%	60%	53%	64%
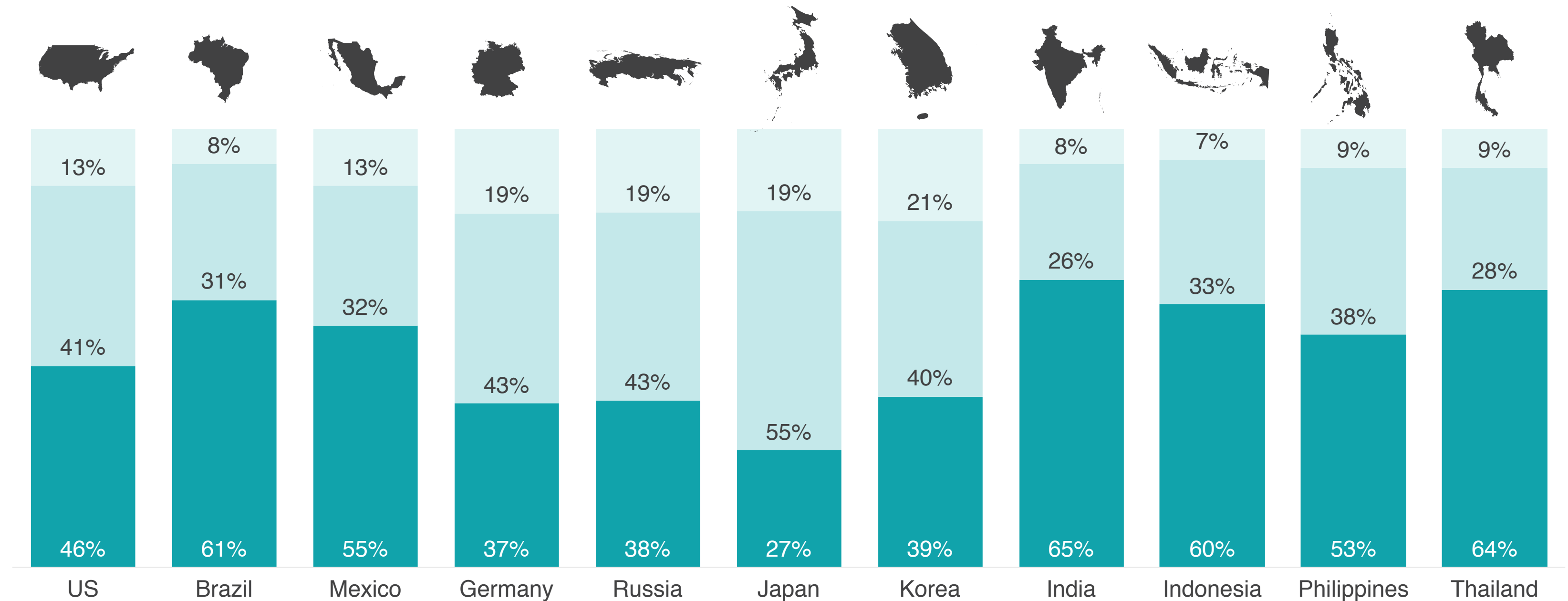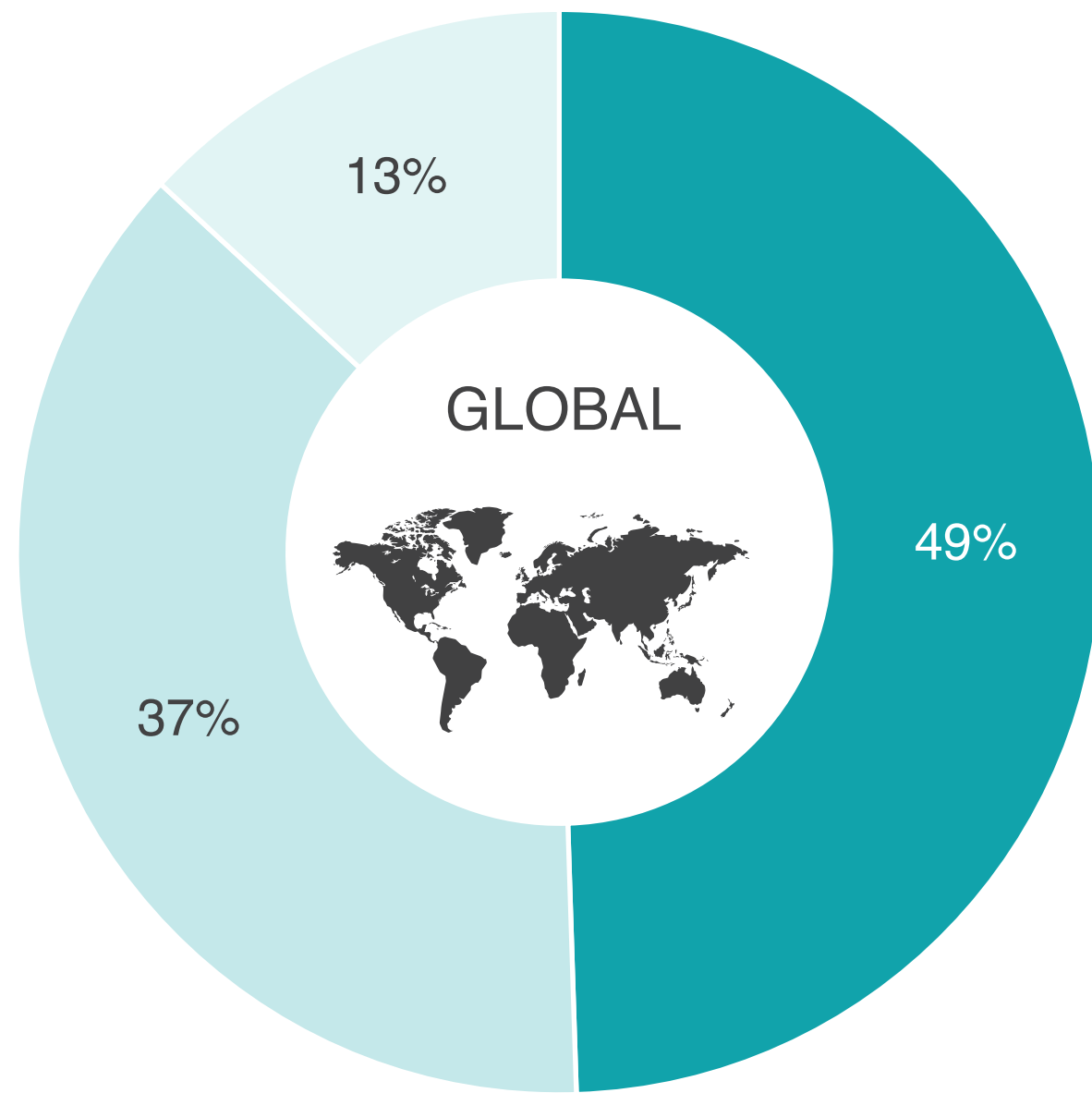
THE ROLE OF TECHNOLOGY HEALTHY DEVELOPMENT VS DEVELOPMENTAL HARM

LEARNING AND MASTERY

As with learning and school success, the majority of parents believe that using digital technology helps their child pursue their interests at least sometimes, and many report that this occurs frequently. Notably, only one in four parents in Japan say that digital tech frequently helps their child pursue their interests.

PARENTS: Digital technology helps my child become more independent

OFTEN/ALL THE TIME   SOMETIMES   RARELY/NEVER

GLOBAL

38%
40%
23%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
RARELY/NEVER	19%	10%	23%	29%	36%	45%	38%	10%	14%	15%	14%
SOMETIMES	44%	38%	38%	44%	42%	46%	36%	27%	38%	44%	38%
OFTEN/ALL THE TIME	37%	53%	40%	26%	22%	9%	26%	63%	48%	41%	48%
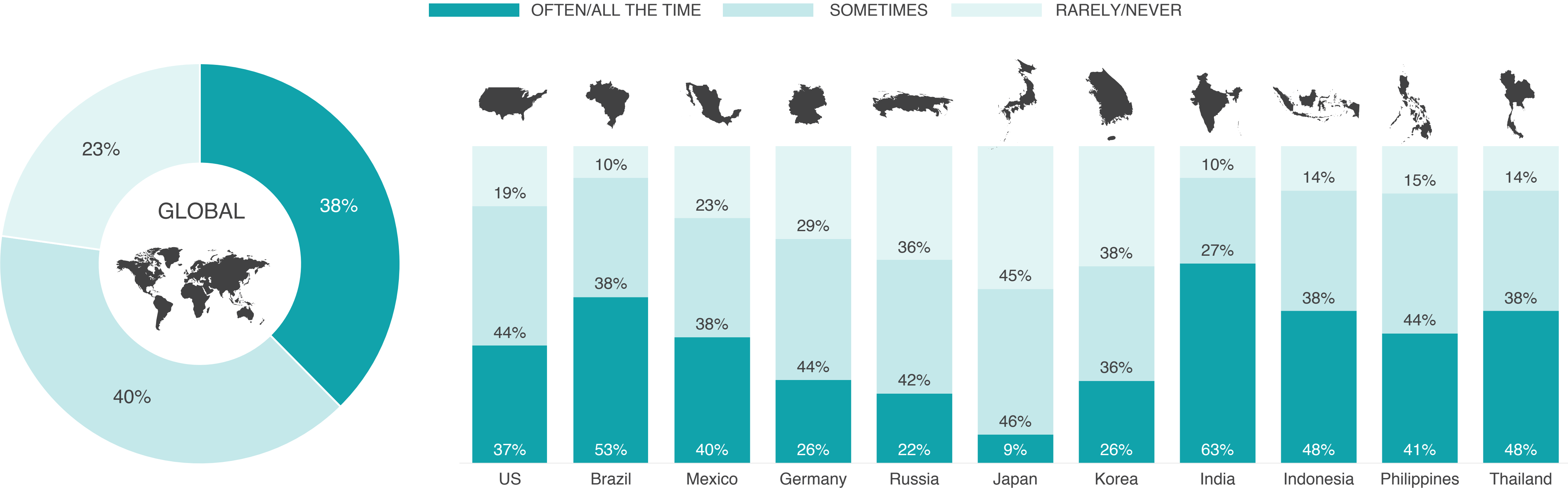
THE ROLE OF TECHNOLOGY HEALTHY DEVELOPMENT VS DEVELOPMENTAL HARM

LEARNING AND MASTERY

While the majority of parents believe that using digital technology helps their child become more independent at least sometimes, this belief is less strong than in other areas of learning and mastery. However, as seen in other examples of this area, parents in Japan are less likely than parents in other countries to associate the use of digital technology with independence.

TEENS: Digital technology helps me succeed with schoolwork

OFTEN/ALL THE TIME   SOMETIMES   RARELY/NEVER

GLOBAL

11%
35%
54%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
RARELY/NEVER	11%	6%	5%	14%	13%	28%	25%	6%	5%	2%	8%
SOMETIMES	37%	34%	25%	43%	41%	54%	42%	23%	25%	27%	36%
OFTEN/ALL THE TIME	53%	60%	70%	42%	46%	18%	34%	71%	70%	72%	55%

THE ROLE OF TECHNOLOGY HEALTHY DEVELOPMENT VS DEVELOPMENTAL HARM

LEARNING AND MASTERY

It would be nearly impossible for today's teens to imagine schoolwork, studying and learning about anything in the world without Google search and the Internet.

Most teens acknowledge the role of digital technology in helping them succeed with schoolwork.

TEENS: Digital technology helps me gain knowledge and skills

OFTEN/ALL THE TIME | **SOMETIMES** | **RARELY/NEVER**

GLOBAL

7%
31%
62%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
RARELY/NEVER	8%	2%	5%	11%	7%	21%	9%	4%	2%	3%	5%
SOMETIMES	37%	29%	21%	37%	33%	59%	40%	17%	20%	23%	24%
OFTEN/ALL THE TIME	55%	70%	74%	52%	60%	21%	50%	79%	77%	75%	71%

THE ROLE OF TECHNOLOGY HEALTHY DEVELOPMENT VS DEVELOPMENTAL HARM

LEARNING AND MASTERY

Most teens acknowledge the role of digital technology in helping them gain knowledge and skills.

Similar to their parents, teens in Japan are less likely than teens in other countries to believe digital tech helps them with schoolwork or learning.

TEENS: Digital technology helps me pursue my interests

OFTEN/ALL THE TIME — SOMETIMES — RARELY/NEVER

GLOBAL

- 61%
- 31%
- 7%

Country	RARELY/NEVER	SOMETIMES	OFTEN/ALL THE TIME
US	8%	35%	57%
Brazil	4%	25%	72%
Mexico	5%	23%	72%
Germany	9%	34%	56%
Russia	10%	36%	55%
Japan	18%	51%	31%
Korea	9%	39%	51%
India	4%	25%	71%
Indonesia	3%	25%	72%
Philippines	3%	27%	70%
Thailand	4%	26%	69%
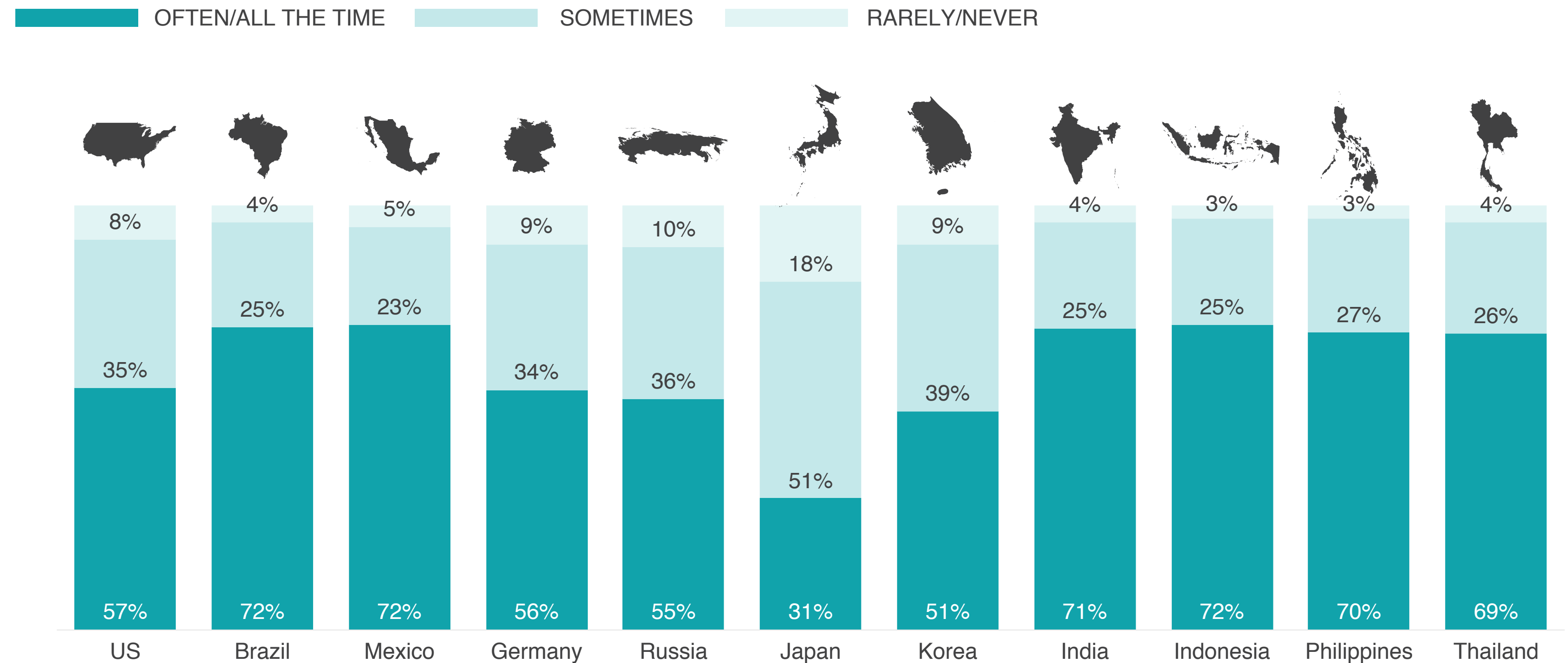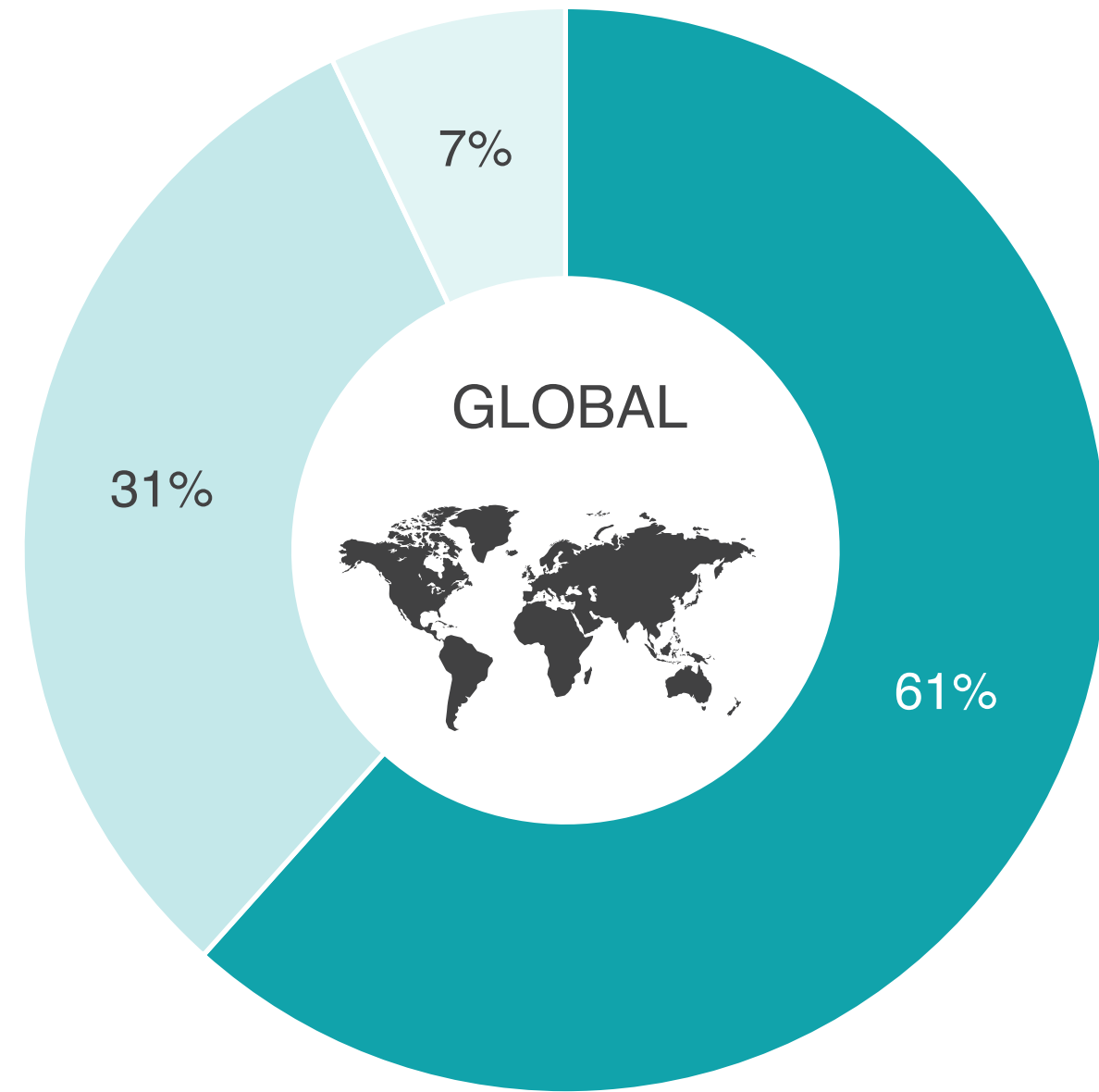
THE ROLE OF TECHNOLOGY HEALTHY DEVELOPMENT VS DEVELOPMENTAL HARM

LEARNING AND MASTERY

Teens believe digital tech is particularly helpful in enabling them to pursue their interests. The majority of teens in nearly all countries report that they frequently use digital tech for this purpose. The only exception is Japan, where only one in three say that digital tech frequently helps them in this area.

Parents are dazzled by the immense learning opportunities afforded their kids by digital technology, by the breathtaking speed and efficiency with which their kids can find answers to the most arcane questions. Yet, they worry that technology turns their kids into lazy learners, that it deprives them of a chance to build up resourcefulness and industry.

"

"My daughter was working on a research project for school, and I have a very old set of encyclopedia. I pulled one out. I put it on the table and I told her to look it up. She's like, 'Are you kidding?' 'Look it up. This is how I did my schoolwork.' She was like, 'How do I look it up in there?' 'Look up a word."

MOTHER OF 13 -15 YEAR OLD

CONCERNS ABOUT SCREEN TIME

Parents commonly expressed concerns about the effects of excessive device/screen time:

- That it interferes with the development of interpersonal skills and the ability to interact with peers in the real world
- That it interferes with children's ability to focus and sustain attention
- That it deprives children of adequate physical activity or causes other physical problems

AWARENESS OF RESEARCH ON IMPACT

While parents are aware of studies showing the negative effects of excessive screen time, many are not convinced of the relevance or those studies for their own children.

Some responded skeptically, saying no one can really know yet what the long-term impact is. Others just said that the impact is different for every child, and thus it may not apply to theirs.

"

"There was something on the news the other day about how much time each age group should have online. There's always been talk about that, like 'Oh, you should only allow an hour a day.' And now they're saying kids are developing carpal tunnel."

MOTHER OF 9-12 YEAR OLD

"

"All the studies that have to do with screen time – with your eyes, how it affects your brain, your sleep patterns. Different types of lights that are coming from the panels. How it affects your kids and their sleeping. There's so much out there that they're learning about that they don't know. How much screen time your kids have is one of the biggest ones."

MOTHER OF 13-15 YEAR OLD

"

"I read a study that by 2032 or something – when our kids are all 30 – that 82% are going to be obese."

MOTHER OF 13-15-YEAR-OLDS

"And many in there are like 'Oh, they're texting and everybody's getting nearsighted.'"

MOTHER OF 9-12-YEAR-OLD

CONCERNS ABOUT IMPACT ON SOCIAL SKILLS

"I've been asking my friends lately just to hang out outside. And they don't want to because of playing video games and I haven't, you know. I don't want to go outside by myself because it's really not that fun. So, I feel like I'm not going out as much just because of them."

MIDDLE SCHOOL BOY

Lack of in-person socialization is perhaps the biggest concern for many parents. Parents worry about how the time spent on devices and gaming hinders the development of interpersonal social skills.

Yet, efforts to generate more unplugged social interactions are often futile. Digital activities (gaming, social media, texting) have become socially normative, forcing even digitally disinclined kids into more screen time, just to fit in their peer group.

Parents concede that insisting on device-free social interactions often backfires, leaving their child feeling like an outcast among peers.

"Let's say we go to a family's gathering, and they have kids, and you see most of the kids, they're on their phones chatting with other friends, and they're not socializing with each other, and you know – when we go out like that, I tell my kids, 'Leave your phones at home.' But then they come, like 'What am I supposed to do now? We tried to play with them, we tried to socialize, but they're too busy making posts.'"

MOTHER OF 9-12-YEAR-OLD

Digital technology helps my child make and strengthen friendships

■ Often/all the time   ■ Sometimes   ■ Rarely/never

	Often/all the time	Sometimes	Rarely/never
Global	37%	36%	26%
US	30%	39%	31%
Brazil	42%	35%	23%
Mexico	34%	33%	33%
Germany	25%	38%	38%
Russia	24%	36%	40%
Japan	19%	39%	42%
Korea	31%	39%	31%
India	60%	28%	13%
Indonesia	56%	32%	12%
Philippines	44%	39%	18%
Thailand	47%	37%	17%
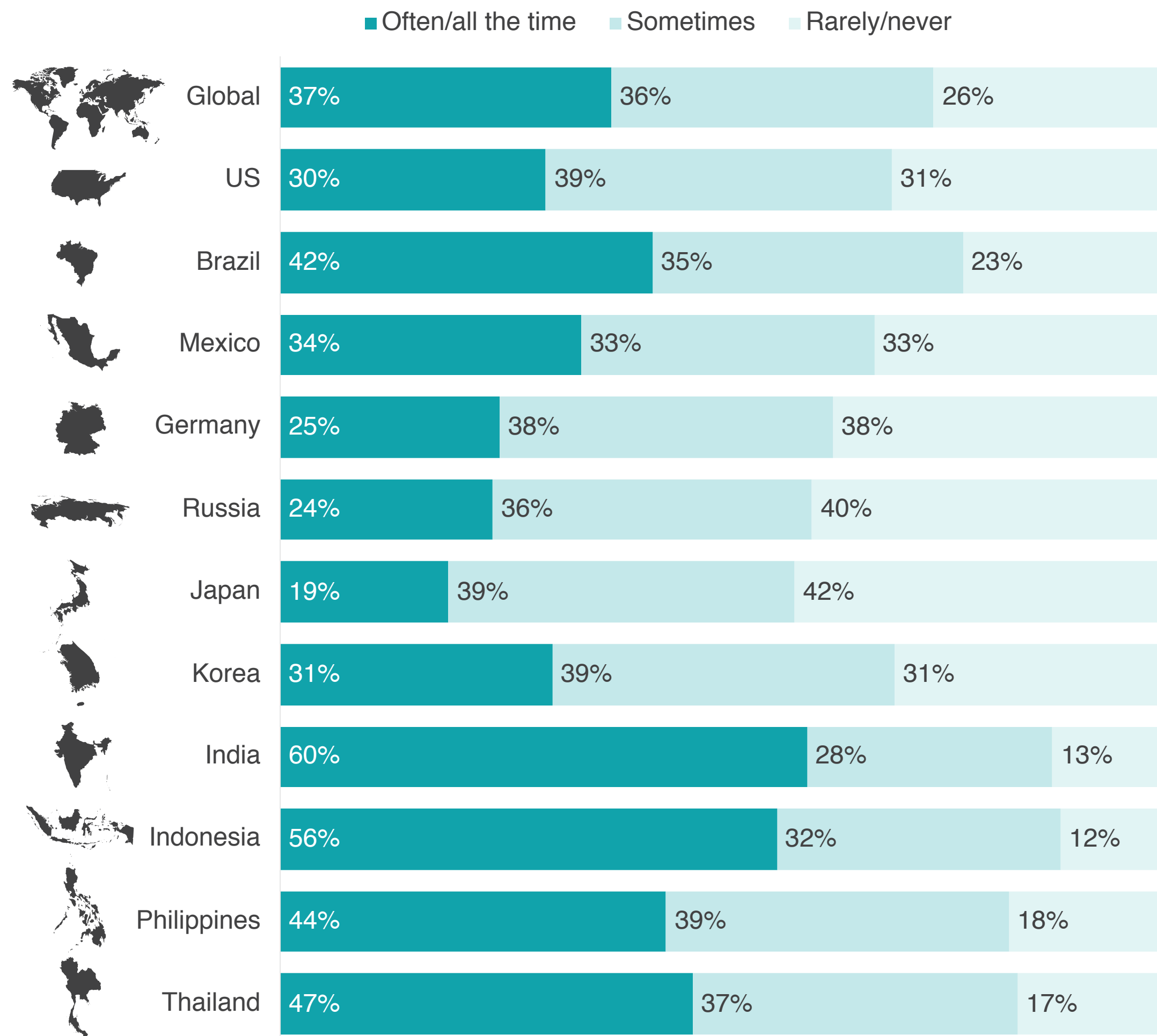
DEVICES ARE SEEN AS A SOCIAL NECESSITY, AS A MEANS FOR KIDS TO ESTABLISH AND MAINTAIN FRIENDSHIPS

Many parents have accepted that online friendships can be beneficial — especially for kids who are shy or socially awkward. It's a form of socializing that they accept. And some parents fear that limiting game time would jeopardize their children's friendships.

———————

"My 12-year old is a lot different from my older son. My older son is very popular in school, has a lot of friends. A lot of girls like him. My 12-year old is nerdy, silly. Great kid, super smart, crafty kid. But he doesn't have a lot of friends at school. When I take the game away from him, he gets upset and says he's spending time with his friends. He has friends online – or all of his friends are online. That's what he tells me."

MOTHER OF 12 YEAR-OLD

"

"If you limit their screen time or access to technology, then they're going to become socially awkward in my opinion – so I remember, when we only let my daughter have Musical.ly for the longest, and when all the other kids have Snapchat, it's like 'Why can't I have it, why can't I have it? Such-and-such girl is on there,' and I'm like 'OK, I don't want you to be the outcast.' And so you just kind of give in and cave in like, maybe, you know, against your better judgement."

FATHER OF 9-12-YEAR-OLD

CONNECTION vs ISOLATION

Digital technology can be both unifying and dividing for families; it serves to both connect and isolate. Parents and kids confessed to their own and their family members' susceptibility to digital diversion, to times spent "alone together." But they also credited digital technology with enabling shared activities and engendering shared interests.

	AMPLIFICATION EFFECT	**MITIGATION EFFECT**	**UNIQUE CONTRIBUTION**
CONNECTION	+ Co-viewing + Co-playing + Communication	- Parental cop-out	+ Photo sharing + Connection with extended family + Shared memes, apps + Social media
ISOLATION	- Seclusion - Family discord	+ "Me time"	- "Alone together" - Addictive apps - Tech arguments - Social isolation

What effect does digital technology have on staying touch with extended family?

POSITIVE **NO EFFECT** **NEGATIVE**

GLOBAL

4%
17%
79%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
Negative	4%	3%	3%	5%	4%	6%	6%	3%	4%	4%	5%
No effect	16%	10%	11%	30%	25%	36%	14%	7%	8%		22%
Positive	80%	87%	86%	64%	71%	58%	80%	90%	88%	94%	73%
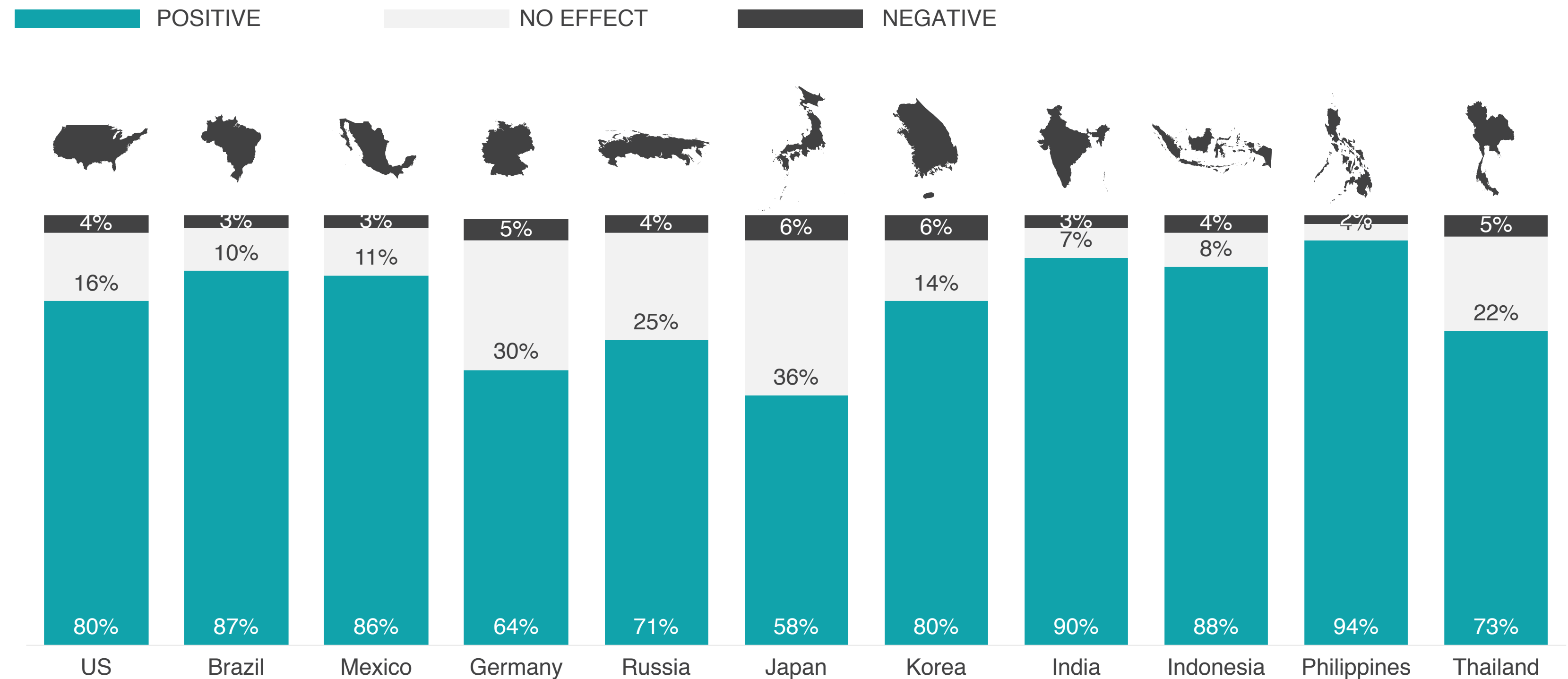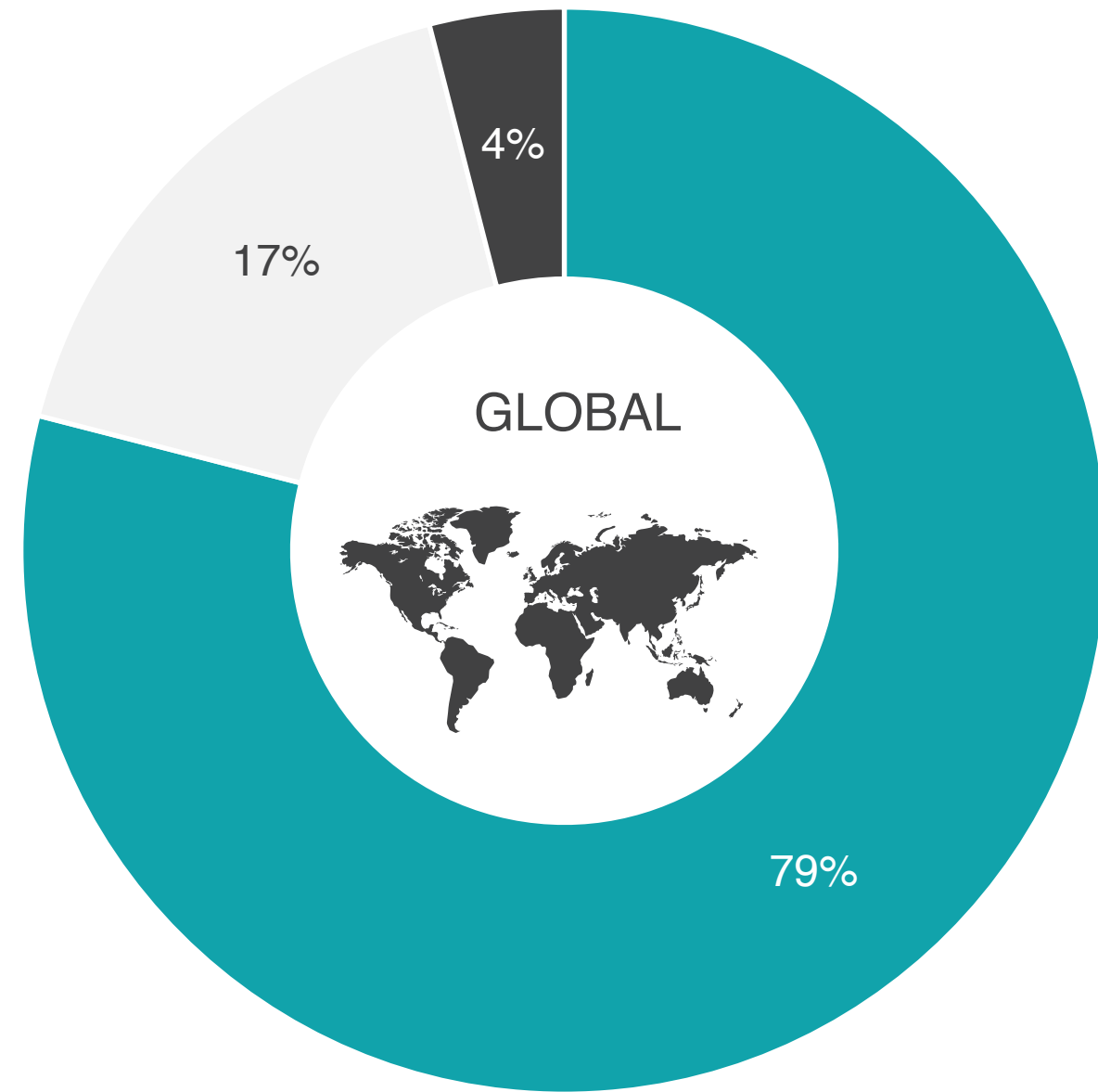
T H E   R O L E   O F   T E C H N O L O G Y

CONNECTION vs ISOLATION

The majority of parents across all countries credit digital technology for helping them stay in touch with extended family.

Filipino parents hold the most positive view of digital technolody's role in this area.

What effect does digital technology have on trying new activities for family to do together?

POSITIVE   NO EFFECT   NEGATIVE

GLOBAL

66% | 27% | 7%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
Negative	8%	7%	6%	6%	6%	10%	13%	5%	5%	5%	6%
No Effect	29%	16%	21%		42%	56%	31%	10%	14%	9%	26%
Positive	63%	77%	74%	47%	53%	34%	56%	85%	81%	86%	68%

(Germany No Effect: 47%)
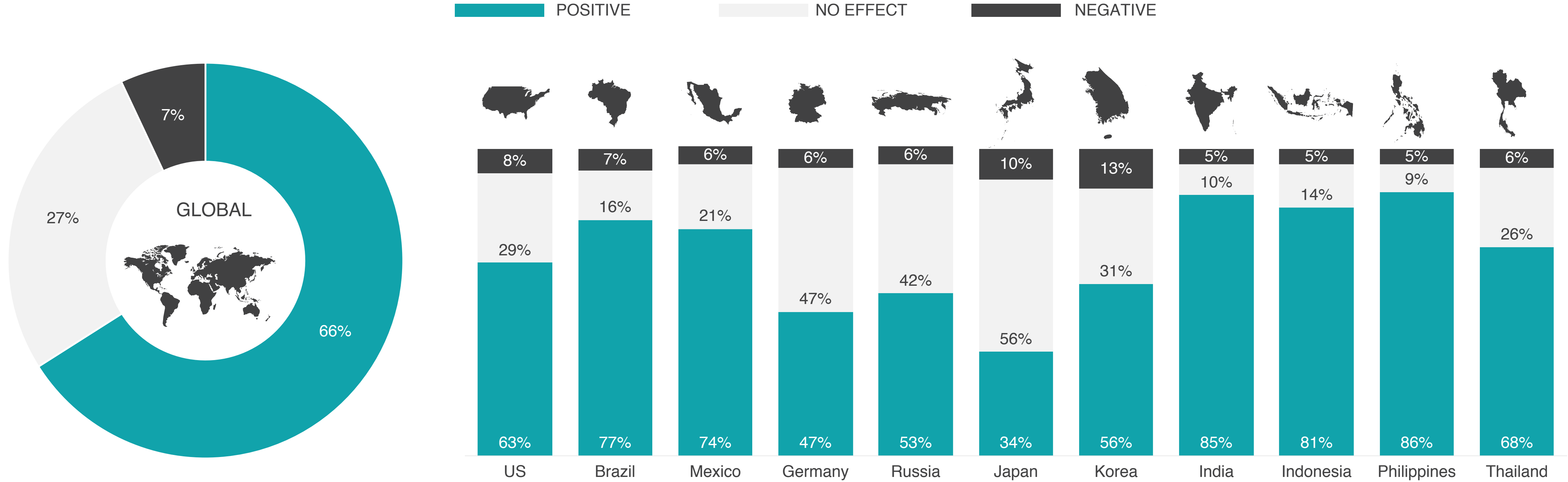
THE ROLE OF TECHNOLOGY

CONNECTION vs ISOLATION

Opinions vary among parents from different countries on the effect of digital technology on new activities for families to do together.

While the majority of parents in most country believe it has a positive effect, less than half of parents in Japan and Germany hold this view.

However, across countries, few parents believe digital tech has a negative impact on families trying new activities together.

What effect does digital technology have on feeling connected as a family?

POSITIVE   NO EFFECT   NEGATIVE

GLOBAL

64%
27%
9%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
NEGATIVE	10%	7%	12%	10%	11%	12%	17%	5%	4%	5%	7%
NO EFFECT	27%	18%	22%	10%			35%	9%	11%	6%	22%
POSITIVE (upper label)				49%	47%	50%					
POSITIVE	62%	75%	67%	41%	41%	38%	48%	86%	84%	89%	71%
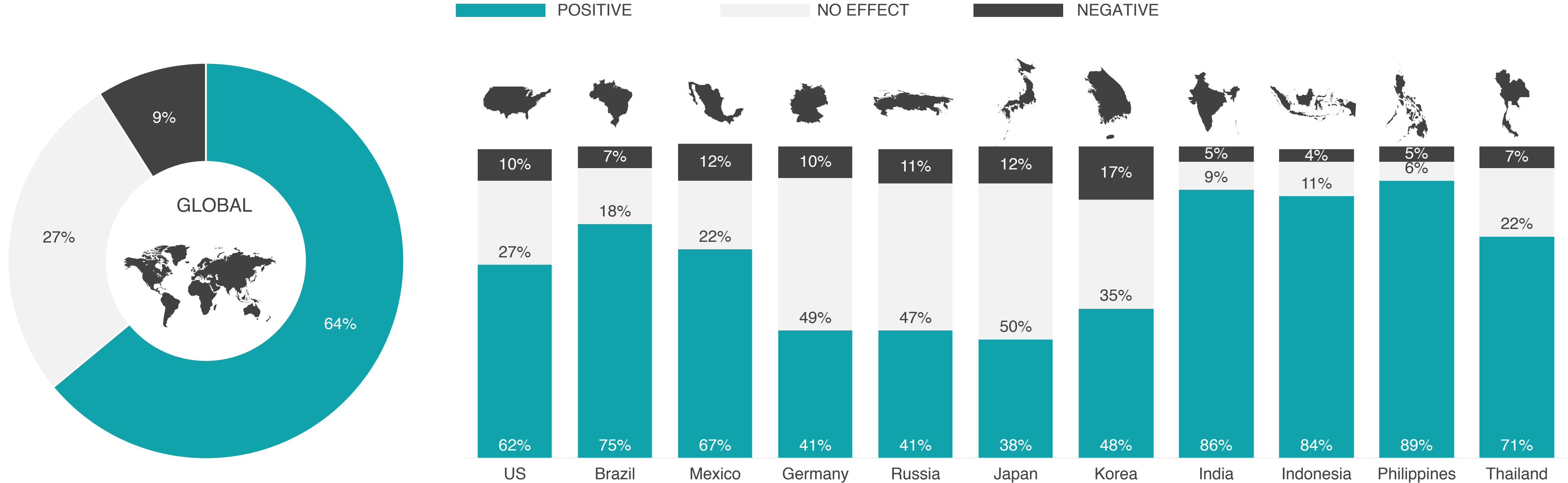
THE ROLE OF TECHNOLOGY

CONNECTION vs ISOLATION

Views also diverge on digital tech's role on family closeness. While most parents in India, Indonesia, the Philippines and Thailand say it has a positive effect on feeling connected as a family, fewer than half of parents in Germany, Russia, Japan and Korea share this opinion.

Notably, nearly two in ten parents in Korea say digital tech has a negative effect on family connectedness.

What effect does digital technology have on balancing alone and together time for family?

POSITIVE   NO EFFECT   NEGATIVE

GLOBAL

12%
32%
56%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
NEGATIVE	11%	8%	11%	10%	17%	17%	20%	8%	11%	8%	9%
NO EFFECT	35%	23%	30%	52%	49%	52%	32%	15%	18%	13%	31%
POSITIVE	54%	69%	60%	38%	34%	32%	48%	77%	71%	79%	60%
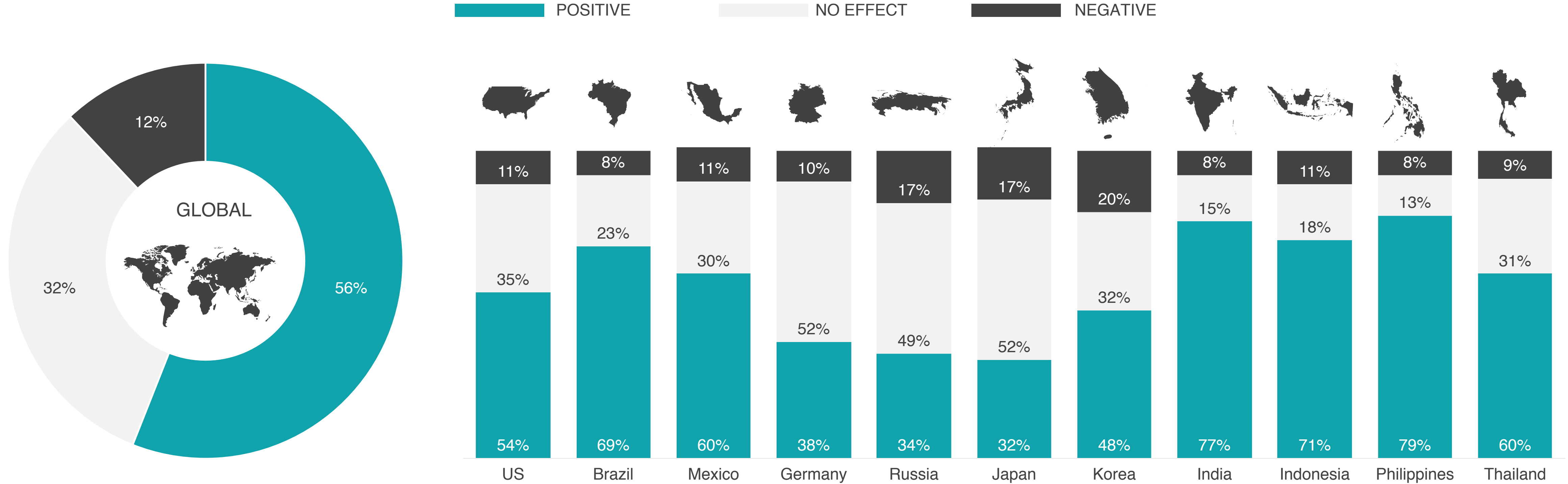
THE ROLE OF TECHNOLOGY

CONNECTION vs ISOLATION

Opinions on the effect of digital technology on balancing alone and together time vary significantly across countries. When it comes to digital tech's effect on balancing alone and together time for their family, a significant minority in Korea, Japan, and Russia observe a negative impact.

What effect does digital technology have on my relationship with my spouse?

POSITIVE   NO EFFECT   NEGATIVE

GLOBAL

10% / 33% / 57%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
NEGATIVE	13%	11%	12%	12%	12%	12%	13%	5%	7%	8%	8%
NO EFFECT	37%	25%	32%	52%	50%	52%	39%	16%	15%	17%	30%
POSITIVE	50%	64%	57%	36%	38%	36%	48%	79%	78%	76%	62%
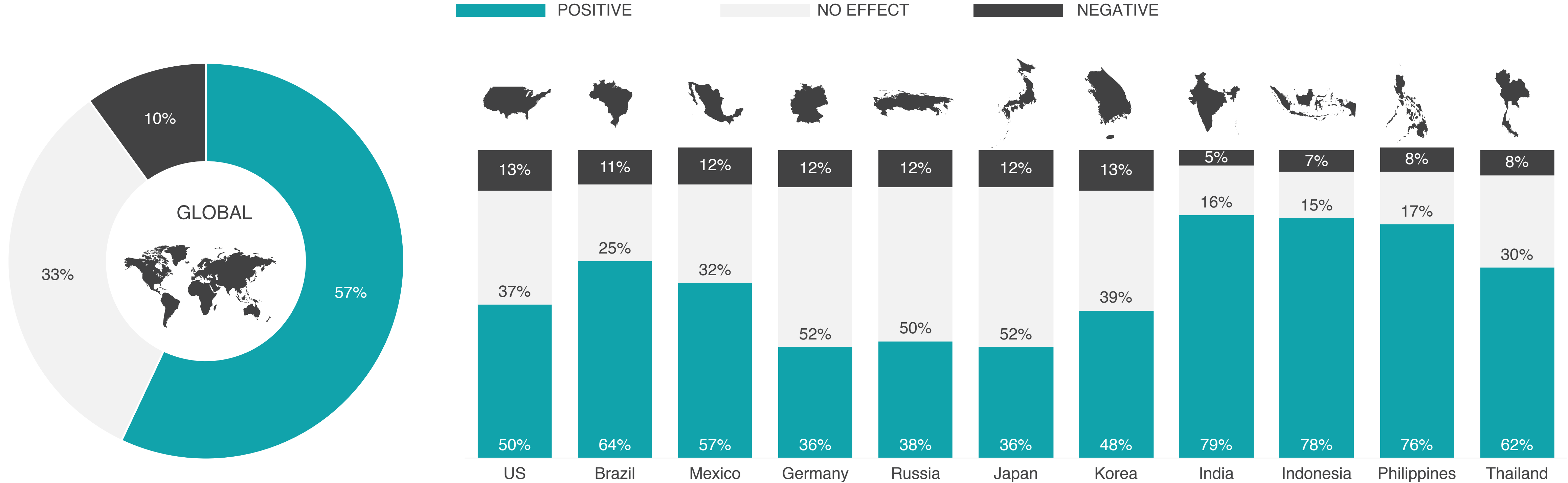
THE ROLE OF TECHNOLOGY

CONNECTION vs ISOLATION

The predominant view among parents in most countries is that digital tech has a positive effect on their relationship with their spouse. However, in Germany, Russia and Japan the most prevalent view is that digital tech has no impact on this aspect of their lives.

What effect does digital technology have on spending IRL time together?

POSITIVE   NO EFFECT   NEGATIVE

GLOBAL
52%
31%
16%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
Negative	17%	16%	18%	18%	22%	16%	27%	8%	15%	13%	11%
No effect	36%	25%	28%	47%	45%	52%	30%	15%	19%	14%	34%
Positive	46%	60%	55%	35%	32%	31%	43%	77%	66%	73%	55%
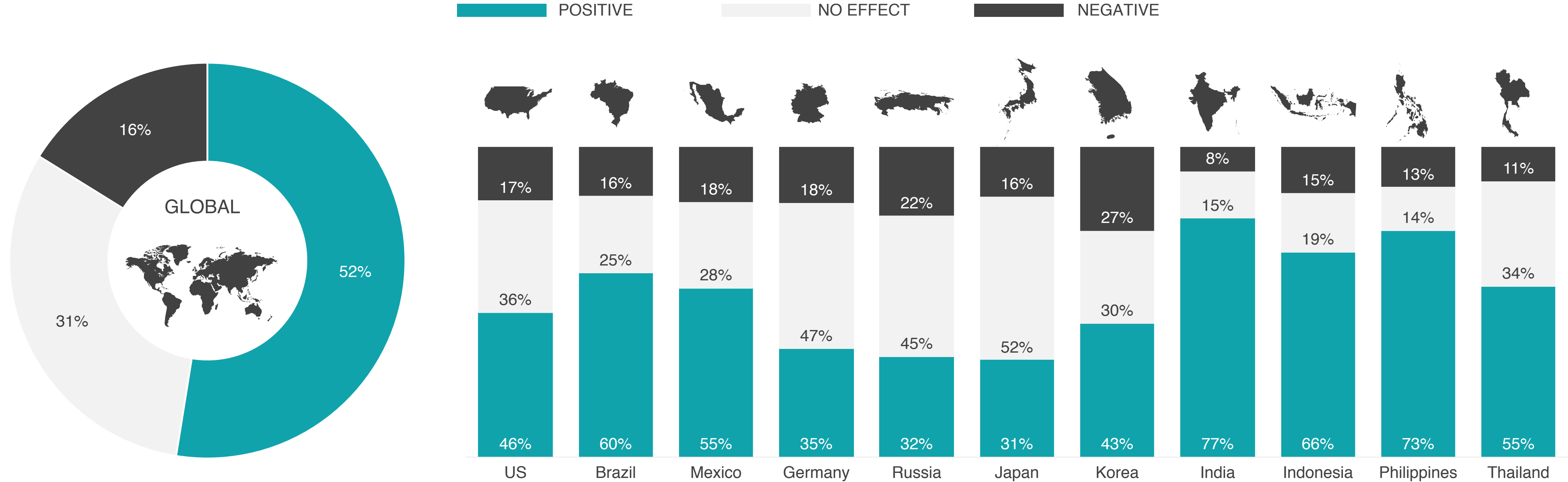
THE ROLE OF TECHNOLOGY

CONNECTION vs ISOLATION

In many countries, a significant minority of parents report a negative impact of digital technology on spending "in real life" time together.

Particularly notable in this regard is Korea, where more than one in four parents say digital tech has a negative effect.

CONNECTION vs ISOLATION

Technology often serves to *facilitate* communication and it is often the *topic* of conversation or the *trigger* for parent-child interaction.

Digital devices are frequently mentioned as being instrumental to an array of interpersonal forms of sharing among family members:
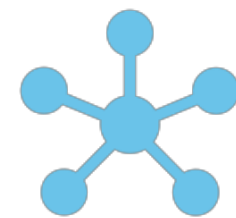
Sharing of memes, apps, funny videos

Sharing of social media posts

Co-viewing, co-listening and co-playing
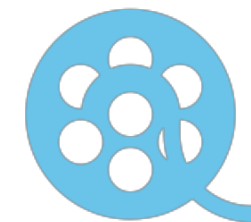
Shared creation of YouTube videos and channels

Shared calendars

Researching answers to questions and sourcing solutions to family challenges together

GLOBAL

Use Smartphone or Tablet **with child** to…

■ Age 2-5   ■ Age 6-12   ■ Age 13-18

	Age 2-5	Age 6-12	Age 13-18
Watch videos on YouTube or YouTube Kids	52%	29%	15%
Watch videos on Netflix, Hulu, Amazon Prime	40%	31%	19%
Listen to audio content	38%	22%	12%
Play video or online games	36%	22%	10%
Read books, magazines, news	24%	22%	12%
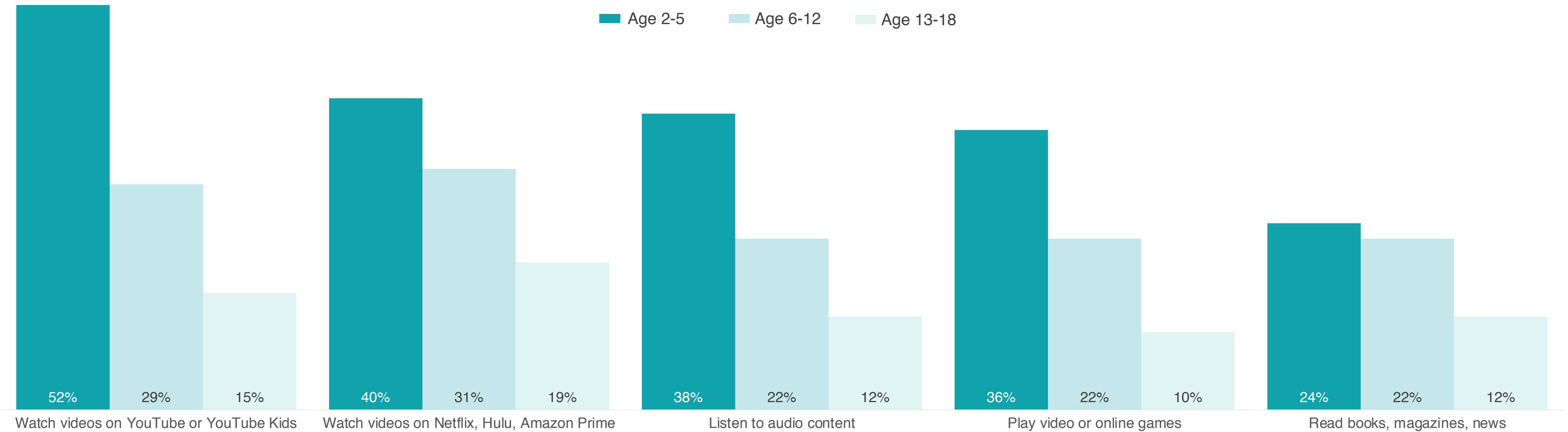
THE ROLE OF TECHNOLOGY : CONNECTION VS ISOLATION

DIGITAL TECHNOLOGY FACILITATES PARENT-CHILD INTERACTION, CREATING SPECIAL MOMENTS OF SHARED ACTIVITY

Parents and children use their smartphones and tablets for shared viewing, listening and playing.

Co-viewing and co-playing declines with child's age in all countries.

Using digital technology helps me relax and unwind: often/all the time

	Teens	Parents
Global	53%	44%
US	53%	46%
Brazil	58%	55%
Mexico	56%	39%
Germany	45%	30%
Russia	52%	38%
Japan	25%	21%
Korea	42%	32%
India	69%	60%
Indonesia	61%	57%
Philippines	60%	51%
Thailand	62%	58%

■ Teens   ■ Parents
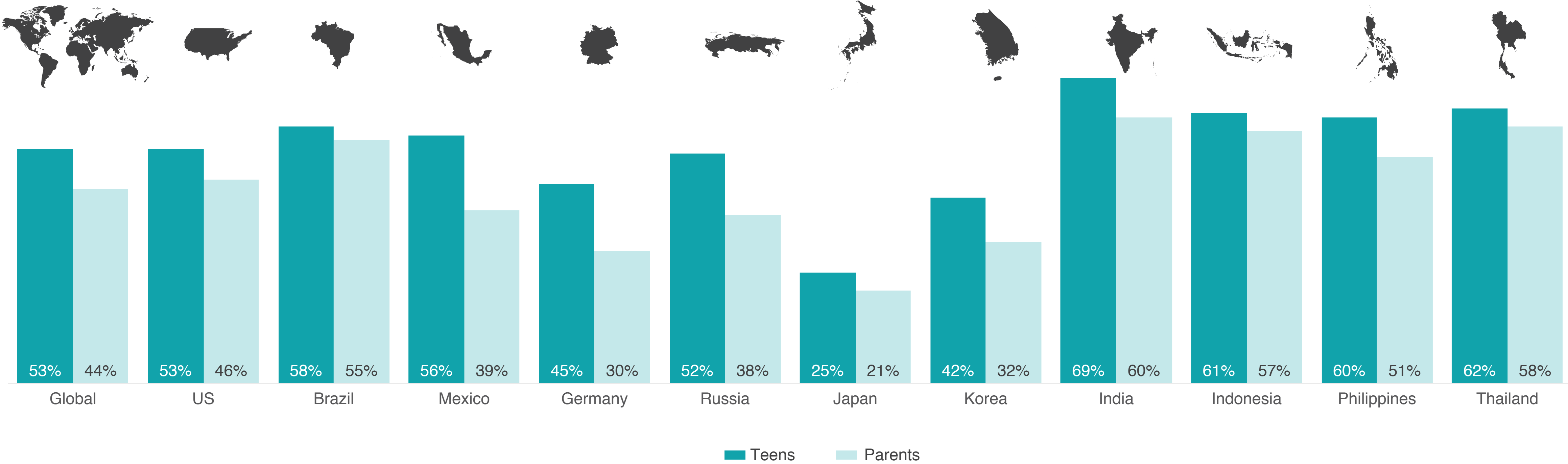
DIGITAL DEVICES MITIGATE STRESS, OFFERING A BREAK FROM AN OFTEN PRESSURE-FILLED REALITY

Digital technology offers an accepted and welcome break for family members from one other. It enables family members to retreat and recuperate when tired or stressed.

It enables parents with squabbling siblings to separate them and engage them with individualized content.

Notably, parents and teens in Japan use digital technology to relax less often than their counterparts in other countries.

Digital technology enables my family to spend more time together

	OFTEN/ALL THE TIME	SOMETIMES	NEVER
Global	31%	38%	30%
US	29%	40%	31%
Brazil	33%	42%	26%
Mexico	29%	42%	29%
Germany	23%	35%	42%
Russia	16%	38%	46%
Japan	12%	44%	44%
Korea	22%	34%	44%
India	55%	31%	14%
Indonesia	45%	37%	18%
Philippines	34%	44%	21%
Thailand	48%	35%	17%
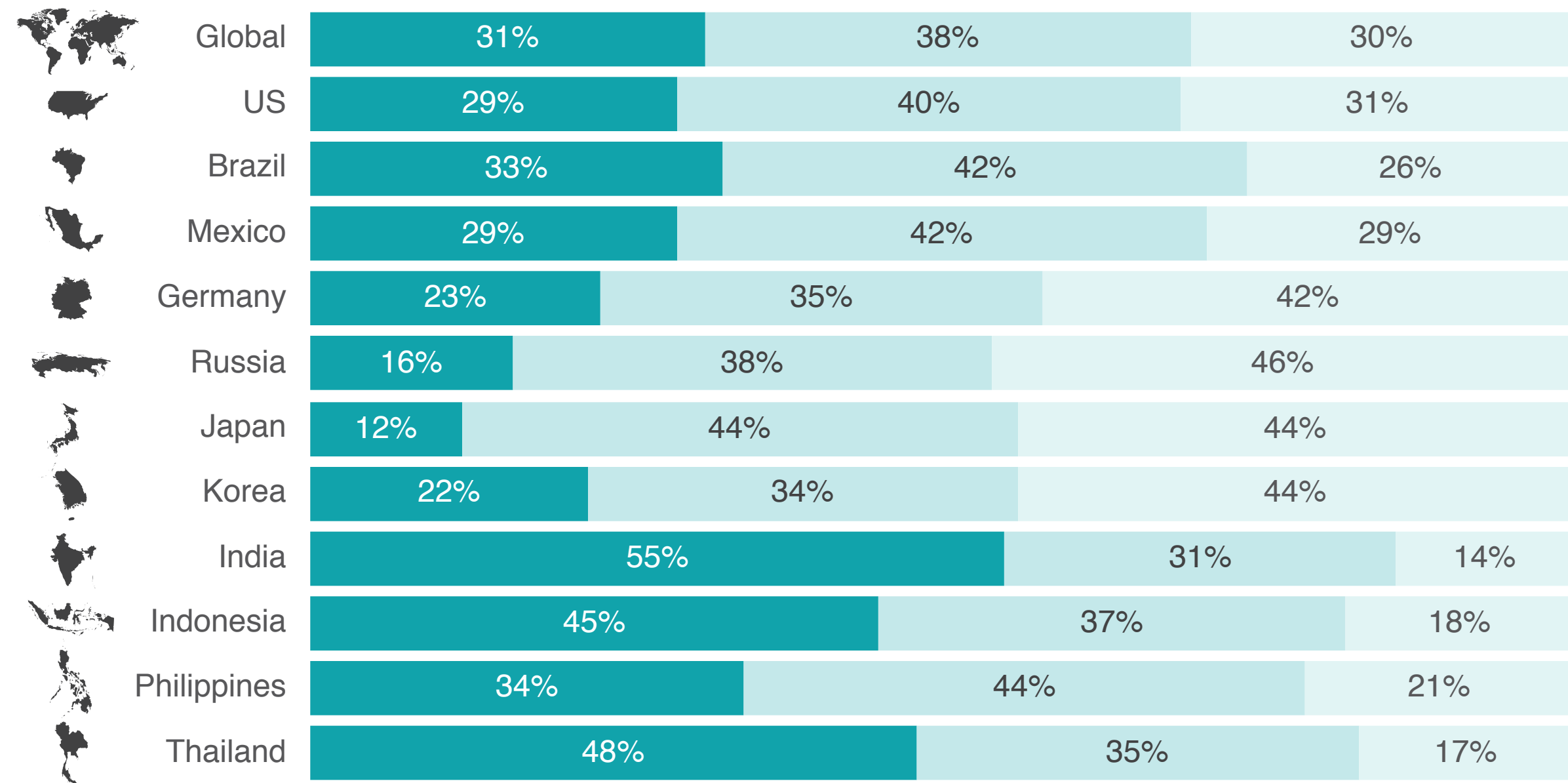
Digital technology causes my family to spend more time on individual activities than doing things together

	OFTEN/ALL THE TIME	SOMETIMES	NEVER
Global	33%	40%	26%
US	33%	41%	26%
Brazil	39%	41%	20%
Mexico	25%	40%	35%
Germany	23%	40%	37%
Russia	28%	38%	35%
Japan	20%	51%	28%
Korea	43%	37%	20%
India	48%	37%	15%
Indonesia	27%	38%	36%
Philippines	34%	43%	23%
Thailand	43%	37%	20%
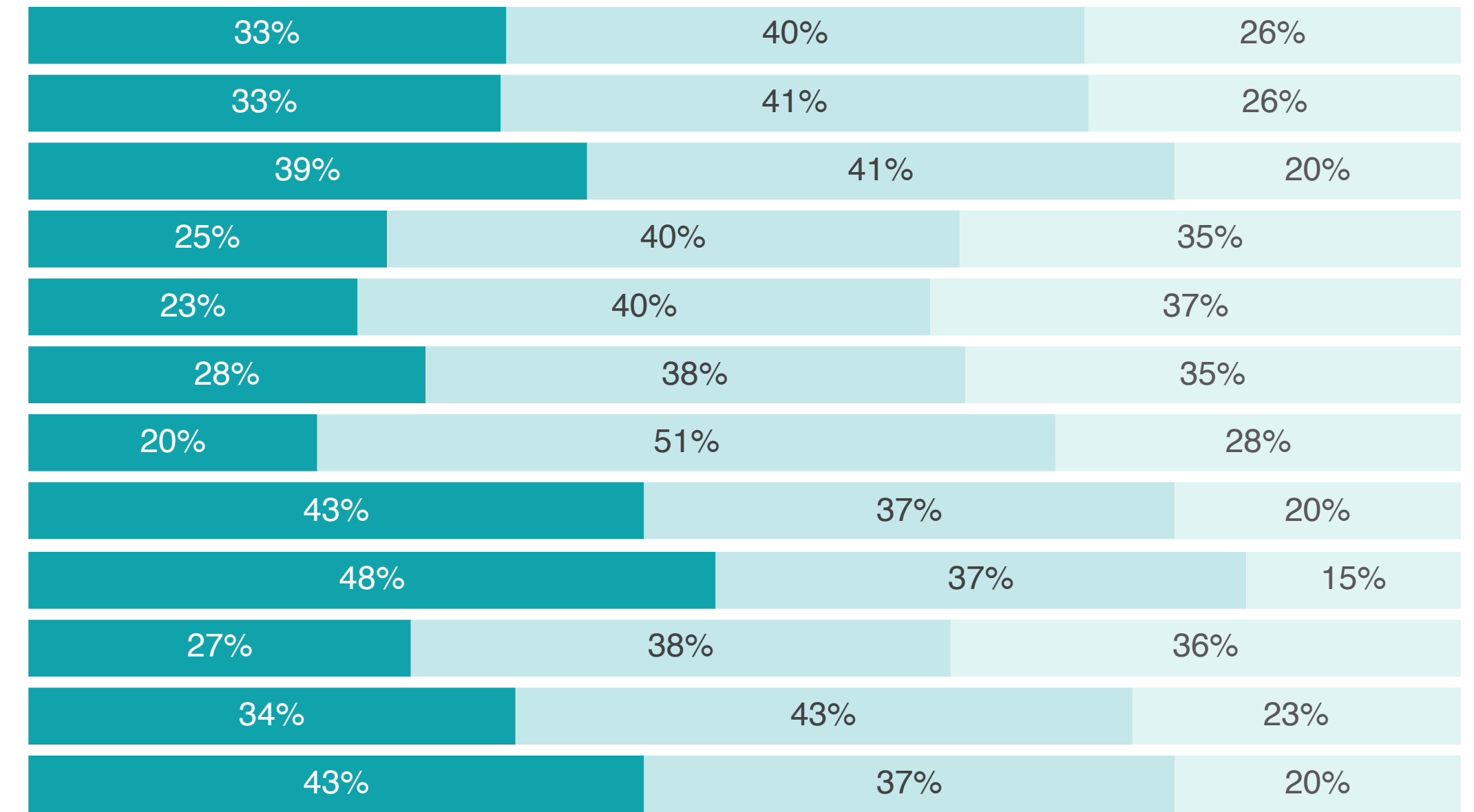
OFTEN/ALL THE TIME   **SOMETIMES**   **NEVER**

THE ROLE OF TECHNOLOGY : CONNECTION VS ISOLATION

TOGETHER OR ALONE?

In most countries, parents are as likely to say that digital technology enables their families to spend time together, as to say that it causes them to spend more time on individual activities. However, in Japan, Korea and Russia, parents are more likely to say that technologies leads to more time spent on individual activities than doing things together.

"

"A lot of our time we sit in the living room and we all surf our own thing. We challenge each other: 'Who's got the funniest meme?' We sit there and show each other. We spend a lot of time doing that."
PARENT OF 9-12 YEAR OLD

"We try and watch movies every once in a while together but we don't always get around to it. I think it majority of times, it's a divider because we're all sitting in separate rooms. Well not separate rooms, but just sitting on our phone, just doing whatever."
MIDDLE SCHOOL BOY

My child and I have arguments about his/her use of digital technology

	Often/all the time	Sometimes	Rarely/Never
Global	18%	29%	52%
US	18%	23%	59%
Brazil	31%	34%	35%
Mexico	16%	21%	63%
Germany	16%	28%	56%
Russia	9%	28%	63%
Japan	6%	24%	70%
Korea	15%	21%	64%
India	32%	31%	37%
Indonesia	17%	38%	46%
Philippines	22%	38%	40%
Thailand	21%	35%	44%

■ Often/all the time ■ Sometimes ■ Rarely/Never
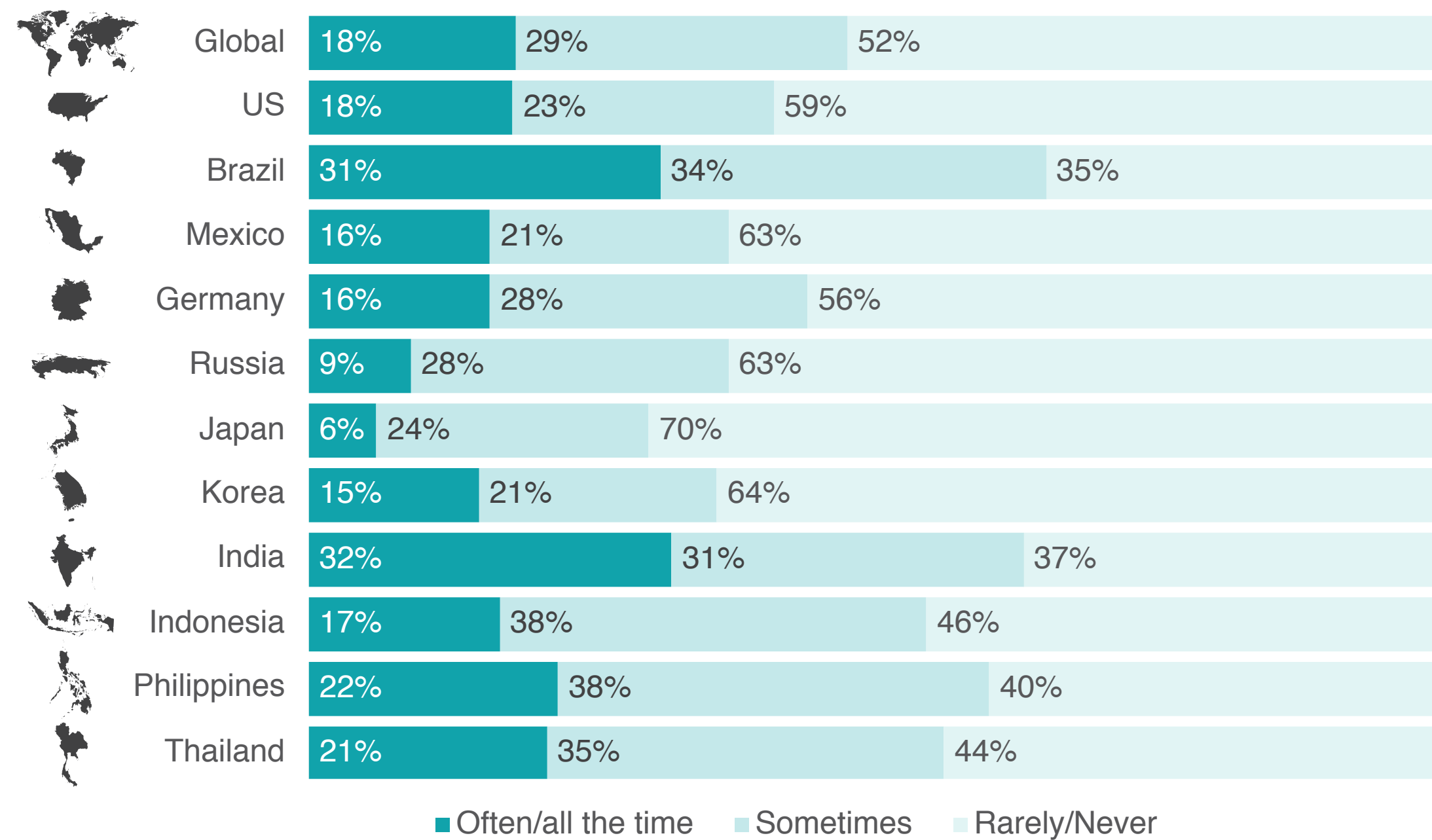
"Trying to pry electronics out of my kids' hands is like taking air from them, so – it's kind of a compromise. The other week my wife had to bribe them, to just say, 'Hey, let's go to the mall so you can pick out some things that they wanted for school, and try to get a meal as a family together. And so, my son - he kind of hemmed and hawed because he wanted to stay on the game, 'I don't want to hang out with you guys.' 'Well, do you want to get something from the store?' 'All right.'"

FATHER OF 9-12-YEAR-OLD

THE ROLE OF TECHNOLOGY : CONNECTION VS ISOLATION

WHEN DIGITAL TECHNOLOGY LEADS TO CONFLICT

Attempts to restrict or control usage of digital device often trigger stressful confrontations between parents and children. Nearly one third of parents in Brazil and India often/all the time have arguments with their child over their use of technology.
Technology also forces parents into unwanted negotiations and compromises: "Do this for me, and I'll let you play your game an extra hour."

The use of digital technology is a source of tension or disagreements in our family

	Often/all the time	Sometimes	Rarely/Never
Global	19%	29%	51%
US	20%	26%	54%
Brazil	20%	28%	53%
Mexico	15%	25%	59%
Germany	17%	34%	50%
Russia	10%	29%	61%
Japan	8%	31%	60%
Korea	19%	35%	45%
India	38%	29%	33%
Indonesia	18%	24%	58%
Philippines	18%	34%	48%
Thailand	28%	28%	44%

- Often/all the time
- Sometimes
- Rarely/Never
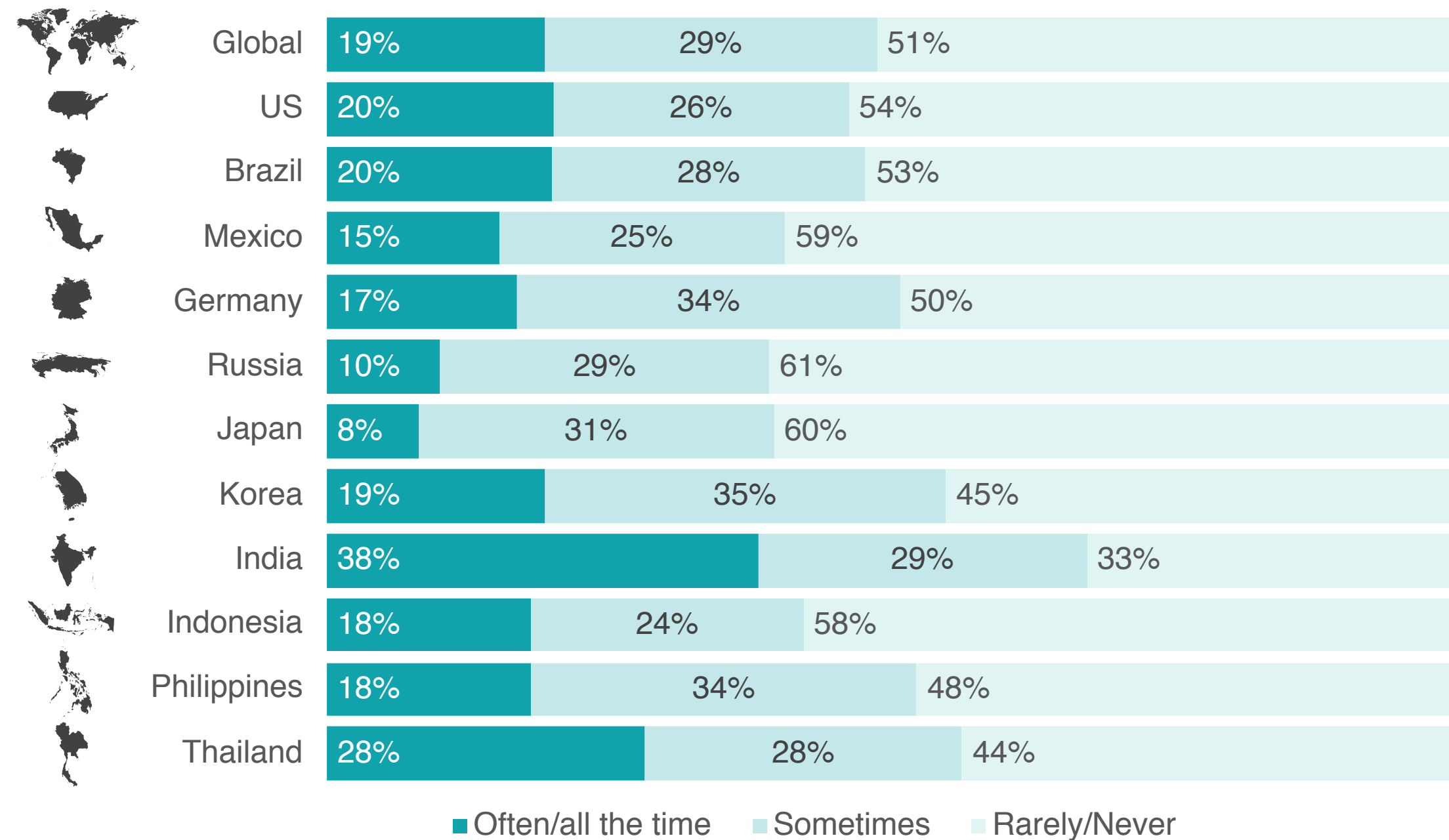
"If I come home, and they haven't done their chores because they were on Netflix or playing Fortnite, it's like World War III, because my wife immediately, like 'Your children didn't do this, they didn't do that.' And now they're annoyed she's done blew a gasket, she's annoyed because they didn't do what they were supposed to do – it's all because they was either on Netflix, they was either Snapchatting all day, they was either playing a game, and so some of that technology is literally distracting from what you want them to do, and they always say, 'I didn't have time', like, 'You were here all day, what do you mean you didn't have time?"

FATHER OF 9-12-YEAR-OLD

THE ROLE OF TECHNOLOGY : CONNECTION VS ISOLATION

ARGUMENTS OVER DEVICE USE CAN LEAD TO TENSION IN THE FAMILY

Parents in India and Thailand are most likely to report frequent disagreements and family tension over the use of technology.

"

DIGITAL DEPRIVATION IS THE BIGGEST SOURCE OF STRESS

"My friction comes with the chargers. If the charger doesn't work in my house, or if you don't have a charger, it's like a total meltdown, like DefCon three. Everything is a fight about the chargers. 'You took my charger. Who took this charger? Where is that charger?' 'I have no power. How can I live?' Like today, we were going to cheer tumbling. I said, 'Boys, charge your iPads.' Then the little one says, 'I only have 71%.' I'm like, 'That's plenty. You have plenty percent.' So, he uses all of it. I swear, it is a comedy hour. He uses all of it and then I'm ready to come here and I'm like, 'We're going.' He goes 'I have no percent!' I'm like 'Oh well, what have you been doing this whole time?' It's a big fight. He is screaming on the floor and kicking his legs. To keep them charged is the fight for us. It is either like they are laying around all dead somewhere because they killed every charger or broke every charger or fought over every charger."

FATHER OF 6-9 YEAR OLD

Going without digital devices for extended periods is unimaginable. Parents described how simply losing power or wi-fi access can trigger tantrums and meltdowns in their kids.

―――――――――――

"His microphone wasn't working the other day and there were tears. So worked up. I said, 'Who cares?' 'You don't get it.' 'I don't.'"

FATHER OF 9-12-YEAR-OLD

"I think sometimes we've all used our devices to kind of distract our kids. We're kind of taking away from parenting them because we just got to get something done and we know if we hand them a YouTube video to watch, they'll watch that YouTube. Whereas my parents – they didn't have that option. They had to be disciplined or watching you."

MOTHER OF 6-8 YEAR OLD

	Global	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
Use digital technology to occupy or pacify	52%	46%	56%	46%	38%	42%	27%	53%	70%	60%	64%	75%
Use digital technology as a reward	45%	46%	38%	50%	32%	31%	25%	50%	70%	37%	56%	63%

■ Use digital technology to occupy or pacify my child so that I can get things done* (% at least once a week)   □ Use digital technology as a reward for my child (% at least once a week)
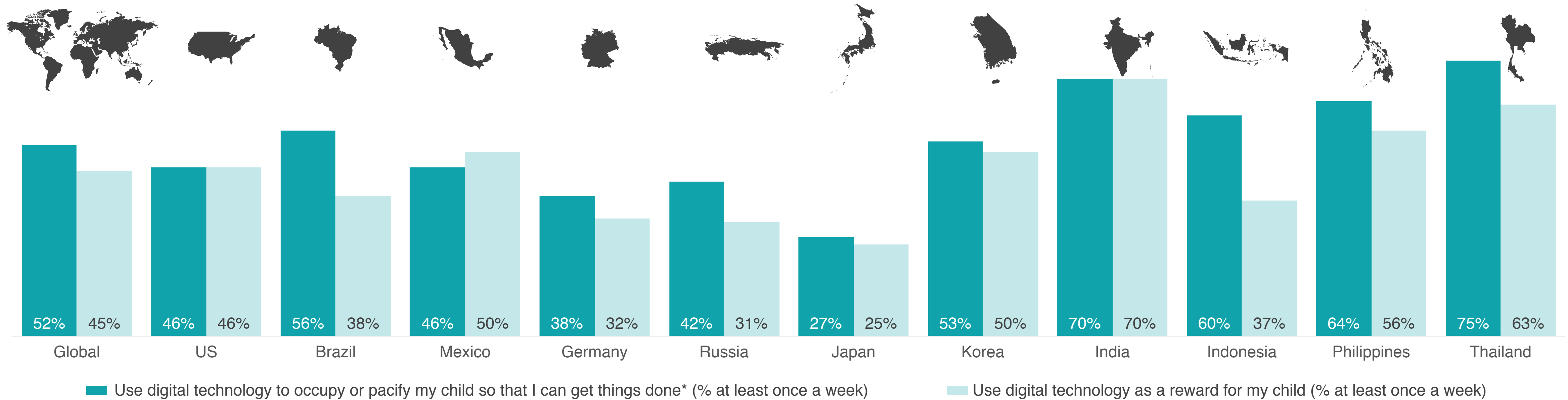
THE ROLE OF TECHNOLOGY : CONNECTION VS ISOLATION

DIGITAL TECHNOLOGY IS CHANGING THE PARENTING NORMS

Digital devices have become an indispensable parenting tool – both as a carrot and stick for behavior management and as a babysitting tool: the readiest, most effective means of keeping children occupied and quiet.

CONNECTION vs ISOLATION

"It's like I've become a lazy parent, like 'Why don't you guys go watch TV or Netflix?' Like shoo them away, so to speak, because I want my time, like 'Why are you not on your phone?' or 'Why are you not playing Fortnite?' And I've found myself doing that more instead of trying to tell them, 'Hey, let's go out and do something.'"
FATHER OF 9-12 YEAR OLD

Parents feel guilt relinquishing some of their parenting responsibilities to digital technology

Parents concede that digital technology offers a tempting parenting cop-out. As one father noted, you don't want the tech to do the parenting for you.

However, they admit it is so easy to turn to devices to occupy their children and buy some peace and quiet for themselves – often to buy time for their own device engagement.

However, the backlash is that it often causes guilt or regret. It's so easy, but it doesn't always feel right.

LOSING BATTLE TO DIGITAL TECHNOLOGY

Some parents expressed a sense of resignation regarding their ability to regain control over their family's use of technology or to establish healthy digital norms.

"

"It kind of started with the technology - once the boys got into the video games, it became harder to get them to come to the table. So, like,

instead of all of us coming together, eat a meal, now it's – 'Can you bring my plate upstairs? I'm in the middle of a match?' And we kind of

just got lax and accepted it, like 'OK.' Or 'I'm on Facetime with my friend, can you come back later?' So, technology, we just kind of let it

infiltrate and ruin. And so, instead of setting those hard boundaries – like my wife, now she tries to retroactively do it, but it's hard now,

because they're so used to it, this is what they crave, you know? I don't know if this is the new reality, or if it's just bad parenting on our part.

You know, how did we get to this state? I wish I had some answers for that."

FATHER OF 9-12 YEAR OLD

THE ROLE OF TECHNOLOGY

"It's like we became strangers, because before when they were younger, we were really close. And now they're teenagers, we're all like scattered. So, I'm in the den watching the TV, on the phone. Daughter's in her room, door closed, whatever device she's on. Wife's in our bedroom, she's in there studying, doing her stuff for college. And then my other son, he's there, in his room, with the door closed. I can hear Fortnite language all night long."

FATHER OF 9-12 YEAR OLD

3

DIGITAL WELLBEING OF FAMILIES

IN SEARCH OF BALANCE

IN SEARCH OF BALANCE

"I do feel like we are all, in the last 20 years, we're the guinea pigs. Our parents had the TV, but the TV wasn't mobile. You didn't take it with you in the car, and take it with you wherever you went. And even the phone, you couldn't pick up the phone and contact anybody in the whole world. So, I do feel like we have a lot more to deal with now, whatever the age group is. It's a lot, and it's a fine line between having them backwards, and living in pilgrim days, or you know… And then you get the parents that, 'Oh, don't let them have a look at the tablet.' Then what are you going to do? Pull a craft out of your pocket every five minutes? So, it's tough, to try to be everything to everyone and be that balance. That's the hardest thing, is the balance."

FATHER OF 9 -12 YEAR OLD

BALANCING IT ALL

Digital technology is fully integrated into nearly every aspect of family life. It has become an indispensable tool in helping families achieve their goals and simply go about their lives. It has also fundamentally altered *the way* families achieve their goals and go about their lives.

Parents – who lack comparable reference points from their own childhood – find themselves in a state of continuous flux and adaptation:
- adapting to their own and their children's use of technology;
- adapting to their children's evolving interests and needs driven by technology; and
- adapting to a new norms in parenting and family dynamics caused by technology.

Families seek balance in their use of technology, in integrating technology into achieving goals and maintaining priorities, while avoiding technology's potential adverse effects.

DEFINING DIGITAL WELLBEING

A key adaptive challenge is not one of rejecting or banning new behaviors and norms driven by technology, but of working out the proper parameters for children's and their own usage. Achieving the desired balance is a key part of digital wellbeing - of family wellbeing.
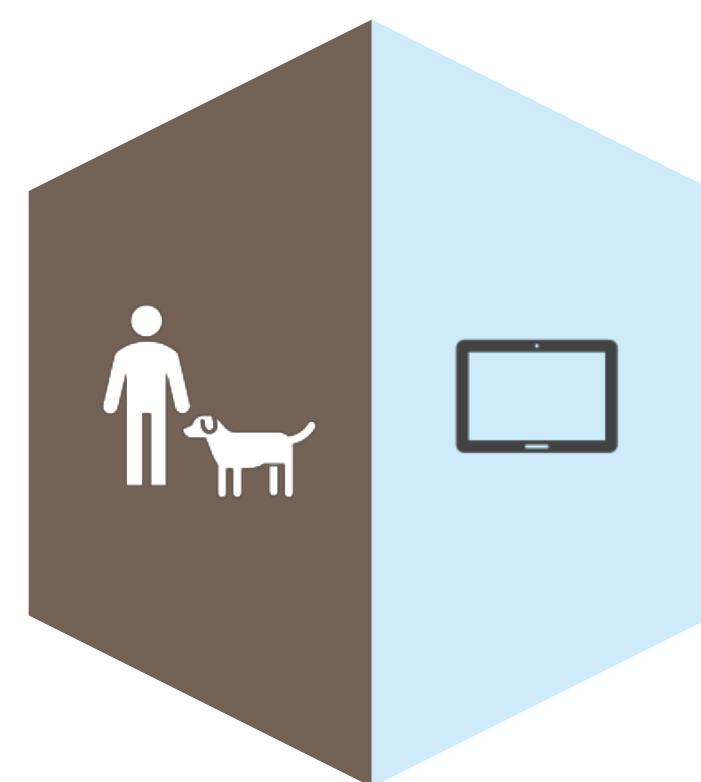
Non-tech and tech time
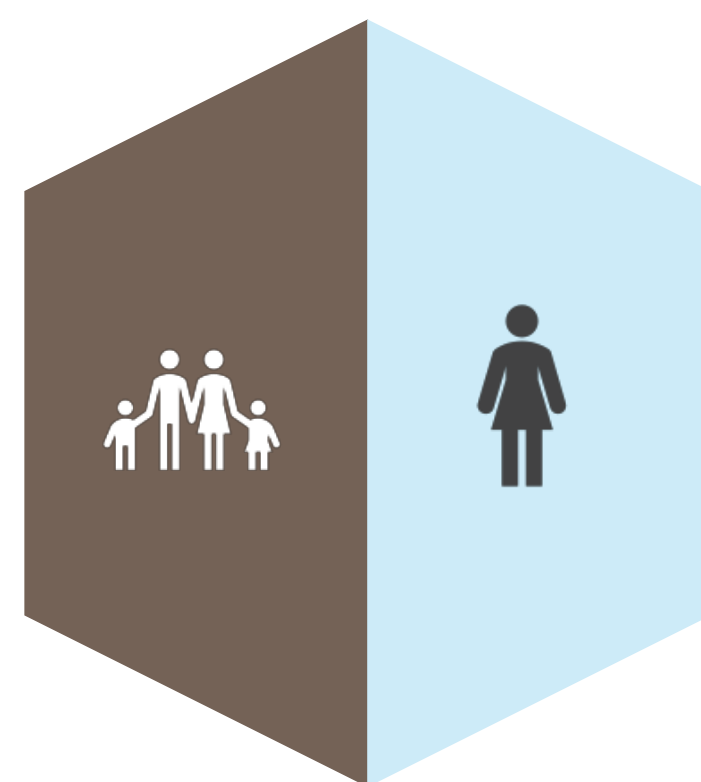
Family and individual time
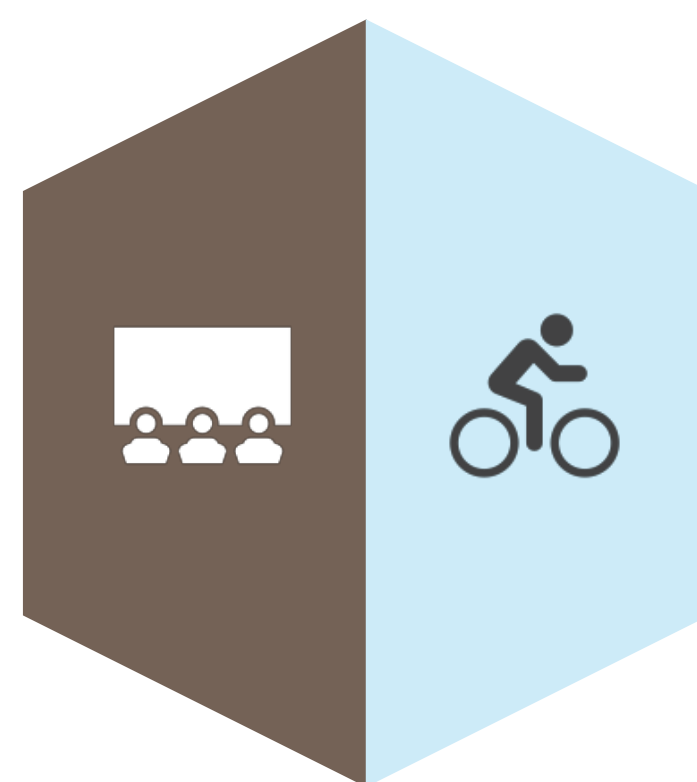
Indoor/idle and outdoor/active time

Learning and playing
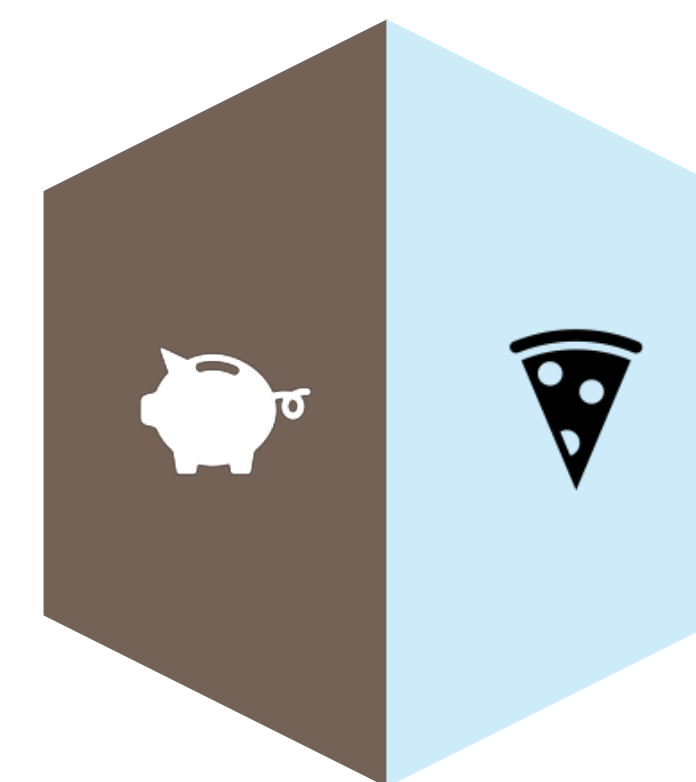
Attentional investment and attentional junk food

"My family has a good balance between using digital technology and staying unplugged"

OFTEN/ALL THE TIME   SOMETIMES   RARELY/NEVER

GLOBAL

15%
50%
36%

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
RARELY/NEVER	14%	13%	12%	14%	16%	28%	27%	7%	7%	8%	15%
SOMETIMES	41%	36%	33%	33%	34%			28%	30%	34%	33%
						50%	39%				
OFTEN/ALL THE TIME	46%	51%	55%	53%	49%	23%	34%	65%	63%	59%	52%
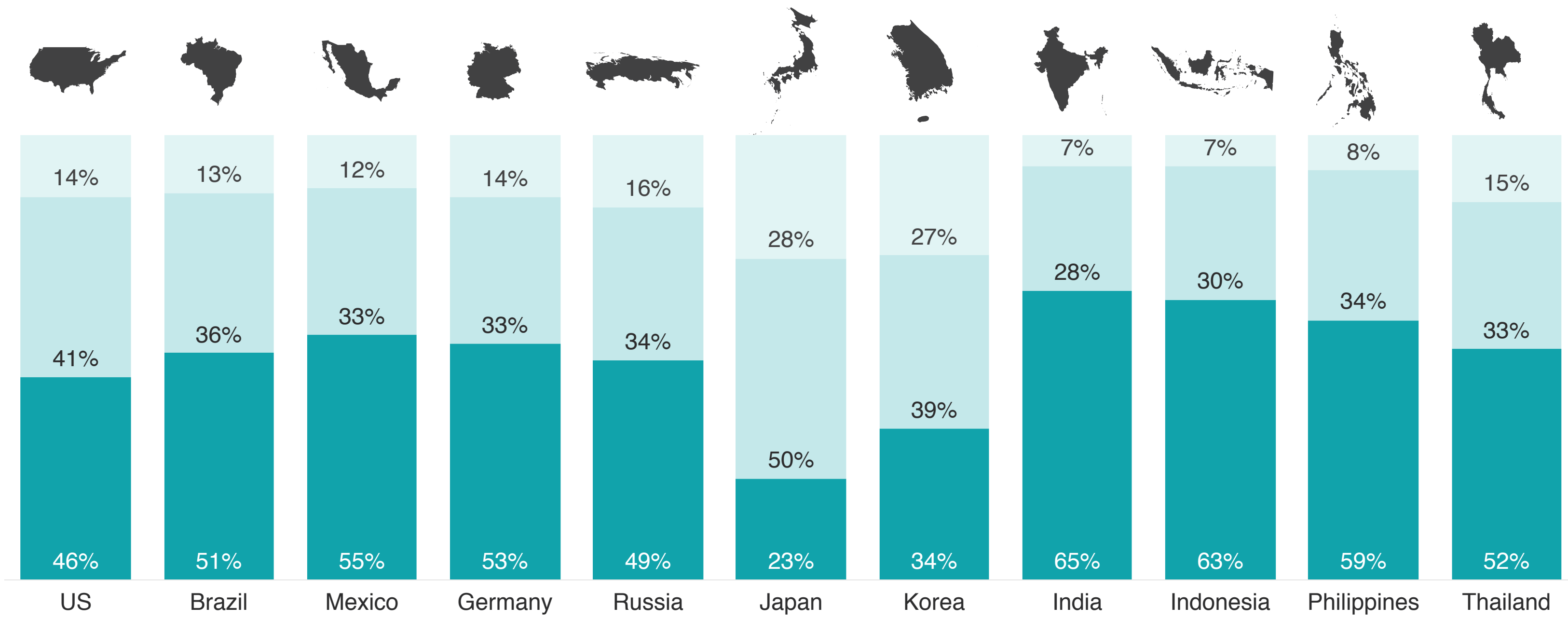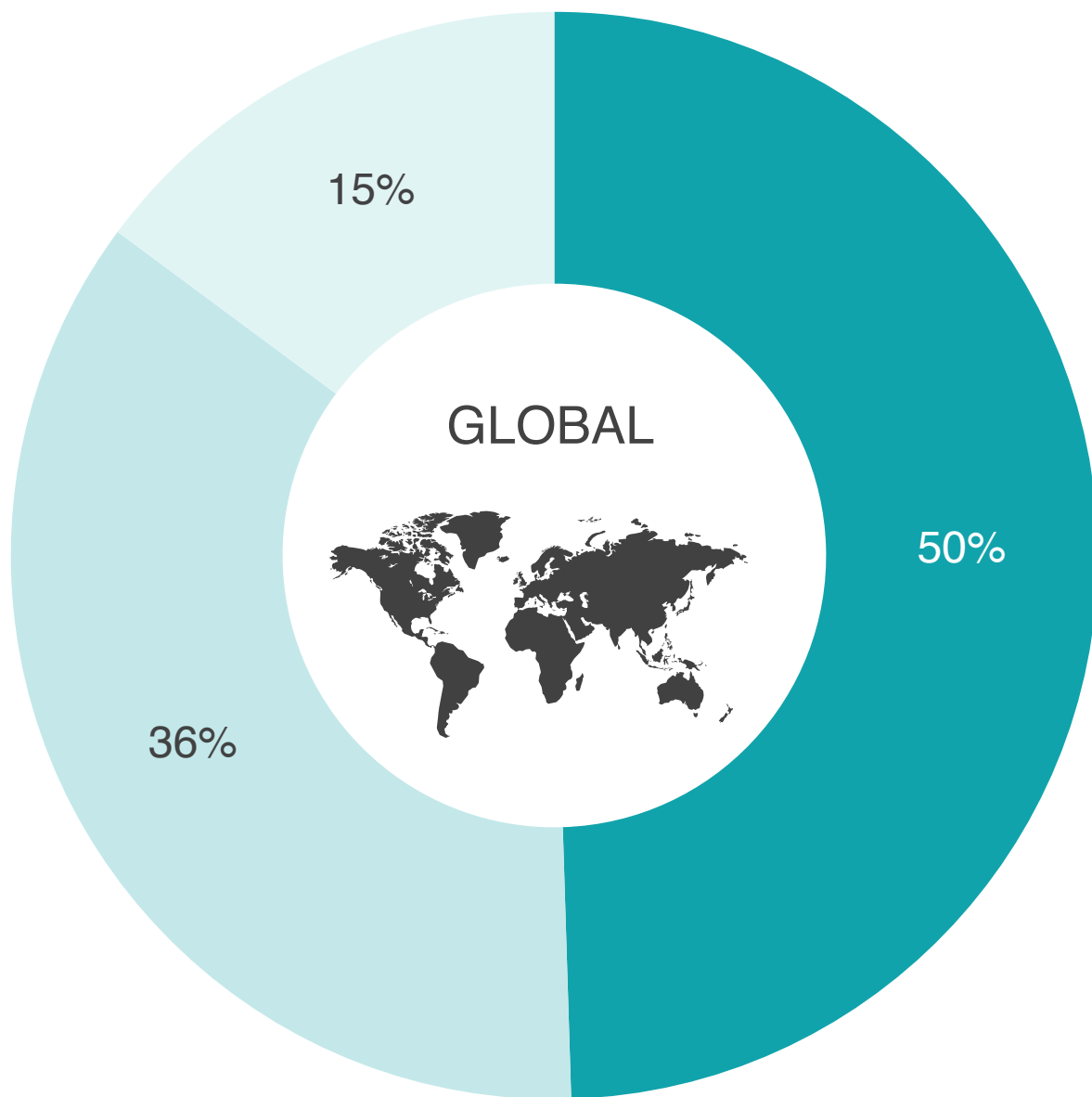
IN SEARCH OF BALANCE

BALANCING ONLINE AND UNPLUGGED TIMES

Balance is a common term for what families seek; but balance looks different for different people. Some are succeeding in finding their ideal, others are struggling.

IN SEARCH OF THE 'RIGHT' BALANCE

Families are writing their own instruction manuals. They are applying different approaches to finding that illusive equilibrium:

- Some accept that childhood is simply different today, and that their children rarely play outside or get exercise, and just hope for the best. Others make it a priority to ensure their kids get outside and get time away from technology.

- Some ensure or insist that their families have non-tech time to communicate and have shared experiences, while others have come to accept that less family time is their new reality; yet others have embraced technology as a way to bring family together in shared digital activities.

- Some have adopted a laissez-faire attitude regarding their children's usage of devices; some have established rules that their children generally abide; some continue to fight it out with their children.

- Some parents are highly trusting of their children; others much less so, and instead engaged in close monitoring of their kids' devices; yet others trust and verify.

There is no prescription for the right dose of tech that works for each family. Optimal levels of usage, oversight, and control are largely unknown, and the assumed optimum varies from parent to parent, and child to child. Many parents are trying (and failing) to control their *own* levels of usage.

RULES AROUND TECHNOLOGY USE

Establishing rules around technology use that their kids would abide is an aspiration for many parents. Yet, those who report that they have imposed fast and strict limitations on their children's device time were in the minority in most countries.

	Global	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
have rules on how much time a child can spend on phone or tablet	**41%**	39%	40%	46%	34%	33%	30%	30%	41%	51%	62%	41%
have rules on when a child can use a phone or tablet	**37%**	37%	38%	46%	32%	25%	27%	32%	36%	53%	55%	31%
have rules on what a child can watch on a phone or tablet	**39%**	41%	45%	46%	35%	32%	23%	28%	36%	59%	57%	28%
usually know what a child is watching on a phone or tablet	**44%**	41%	47%	56%	36%	47%	30%	31%	51%	49%	55%	36%

"The key is boundaries. You have to set boundaries and stick to them."

FATHER OF 6-8 YEAR OLD

RULES AROUND TECHNOLOGY USE

Not surprisingly, having rules around technology use is highly correlated with child's age.

Parents of children ages 9-12 express the greatest anxiety regarding their children's device usage. At this transitional stage, children begin to engage with social media, to join online multi-user games, and explore more widely online, increasing the risk of encountering inappropriate content. It is also at this stage that school becomes more high-stakes and parents begin to worry about homework completion and focus on studies.

Parents of older teens tended to be the most relaxed and philosophical about technology use. In effect, they say they have either succeeded or failed at instilling self-management, establishing ground rules, or engendering priorities and values, and feel it is now largely out of their hands.

GLOBAL: Family Rules

	Age 2-5	Age 6-12	Age 13-15	Age 16-18
Rules about how much time child can spend on phone or tablet	49%	51%	39%	24%
Rules about when child can use phone or tablet	46%	47%	35%	22%

■ Rules about how much time child can spend on phone or tablet   ■ Rules about when child can use phone or tablet
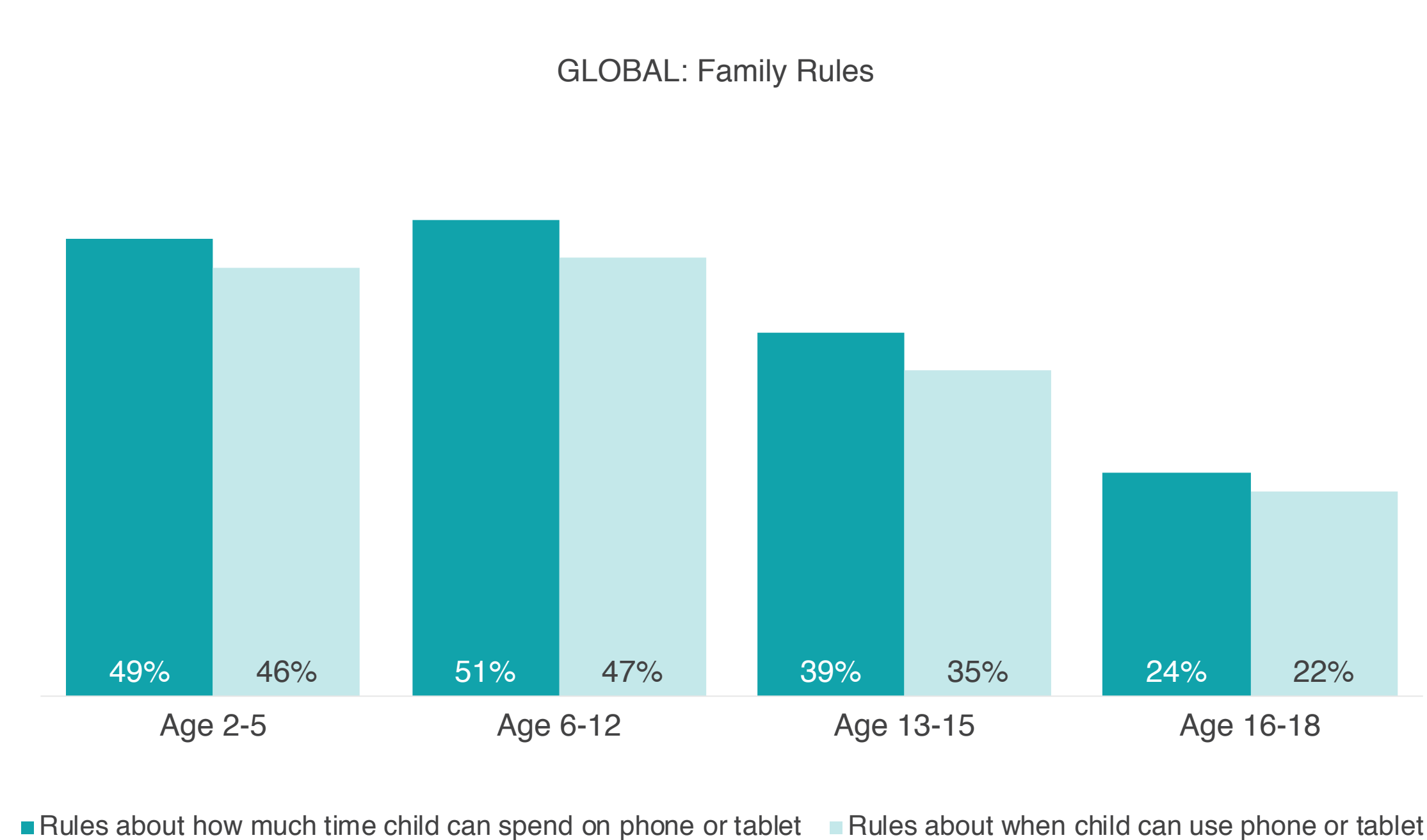
"You are really only worried about the one with the grades now that really matter. You are not worried about the little ones."

MOTHER OF 9-12 YEAR OLD

RULES AROUND DIGITAL CONTENT

Parents establish rules around the type of content their children are allowed to watch, and they monitor what their children watch on their phone or tablet. Parents of children age 2-12 are significantly more likely to do so than parents of teens.

However, many parents expressed skepticism that they can effectively police their children's exposure to inappropriate content. While some lacked the knowledge of how to use parental controls, others were resigned to the fact that kids will find a way around parental controls.

"I feel like it's hard to parentally-control everything. We have the Fire Stick. And my son, even though he's only four, is very deft with the Fire Stick. And just the other day I walked in and I heard something and I was like 'No,' and he's in there and he turned the Spotify on, and it was Tupac just gangster rapping with nonfiltered language. And I still don't even know how to parental control the Spotify."

FATHER OF 4-YEAR-OLD

GLOBAL: Family Rules

47%	56%	48%	52%
Age 2-5		Age 6-12	

| 36% | 39% | 24% | 29% |
| Age 13-15 | | Age 16-18 | |

■ Rules about what child can watch on phone or tablet   ■ I usually know what my child watches on phone or tablet
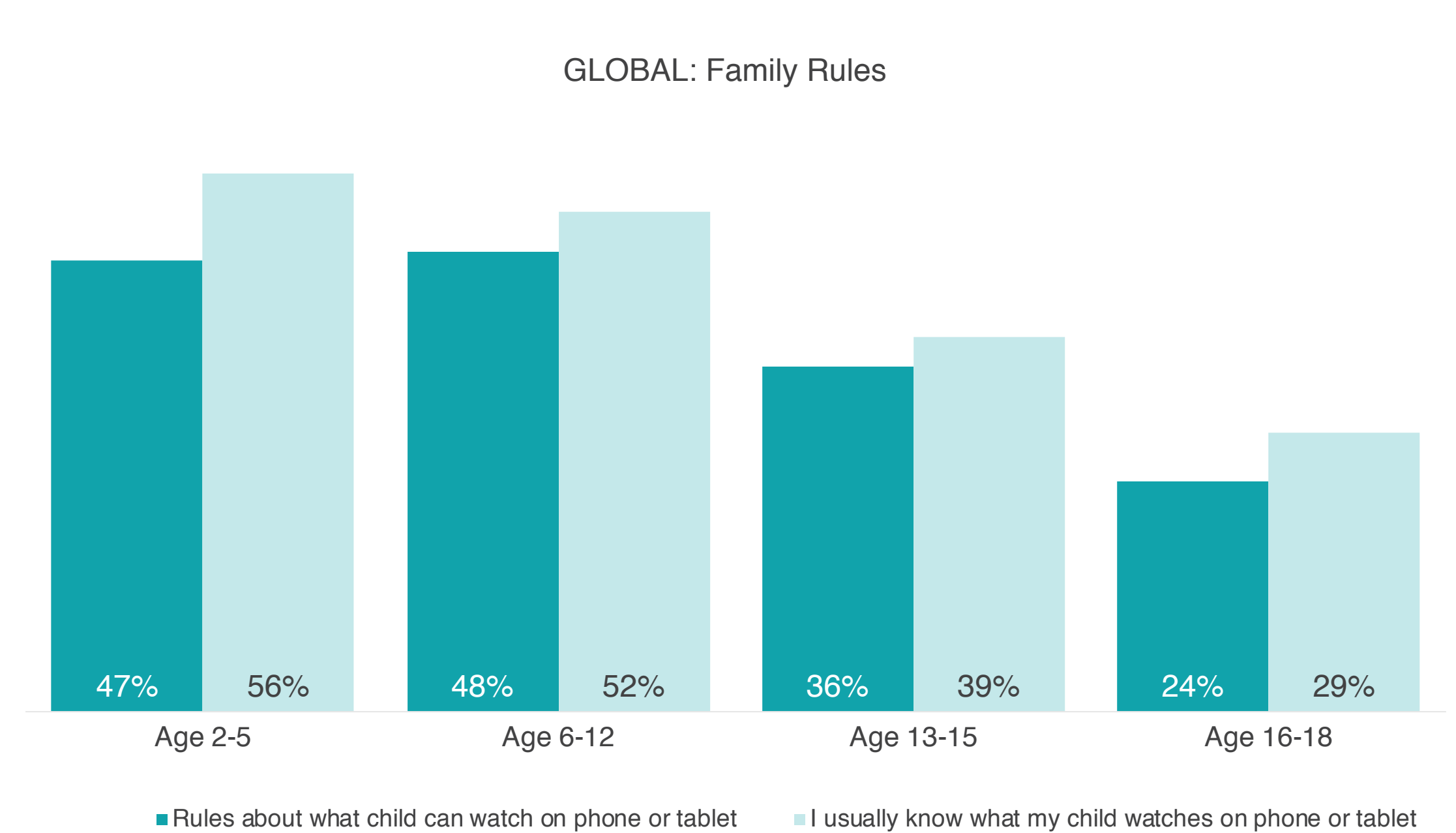
DINNER-TIME RULES

Meals are widely described as the final bastion of device-free space and time. While many families permit devices at the table, others see this as the one remaining sacrosanct time and space, especially when eating at home. Dinner time rules are laxer for younger kids and increase with child's age. Parents in Mexico, Philippines and Brazil are most likely to have rules around dinner time use of devices, while parents in Russia are most lax about dinner time rules.

GLOBAL: Our family rule is no devices during dinner

	Age 2-5	Age 6-12	Age 13-15	Age 16-18
	42%	46%	49%	46%

	Global	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
Our family rule is no devices during dinner	46%	43%	54%	61%	47%	30%	43%	40%	42%	46%	57%	41%
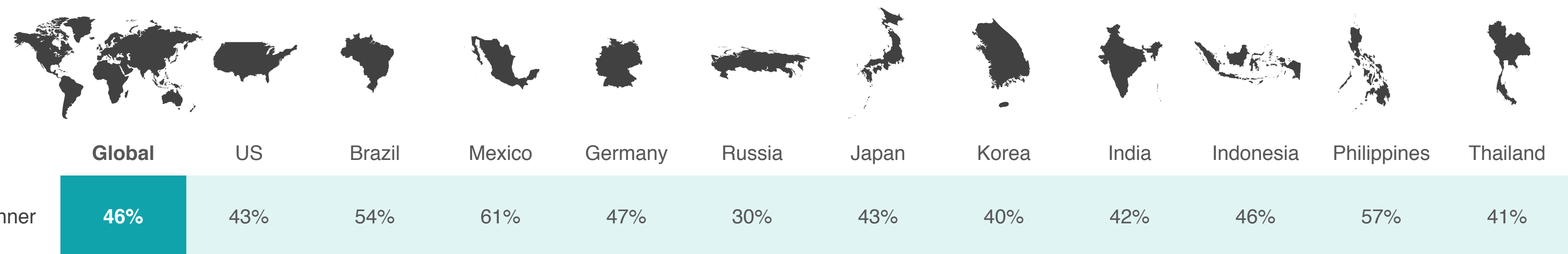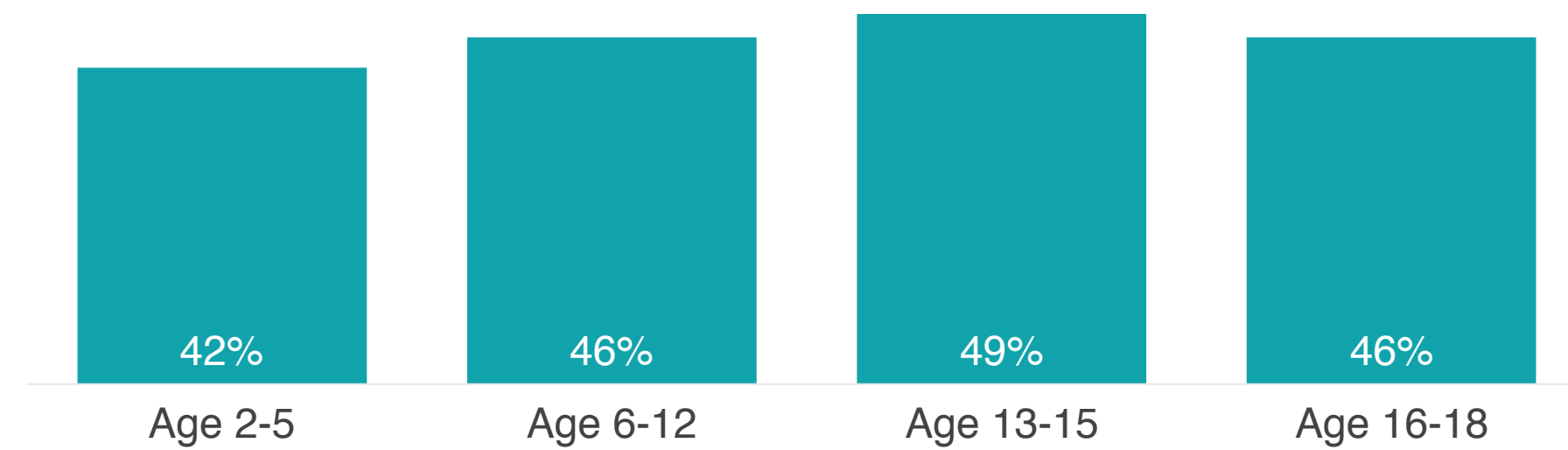
USE OF MONITORING APPS

Use of parental control apps to monitor children's technology usage is not widely spread. Only 16% of parents globally use apps to monitor the time their child spends on devices. Indian parents use monitoring apps in higher numbers (30%).

Parents are more likely to use apps for blocking inappropriate content.

Not surprisingly, monitoring of device usage declines steadily with child's age.

GLOBAL: Use of parental control apps
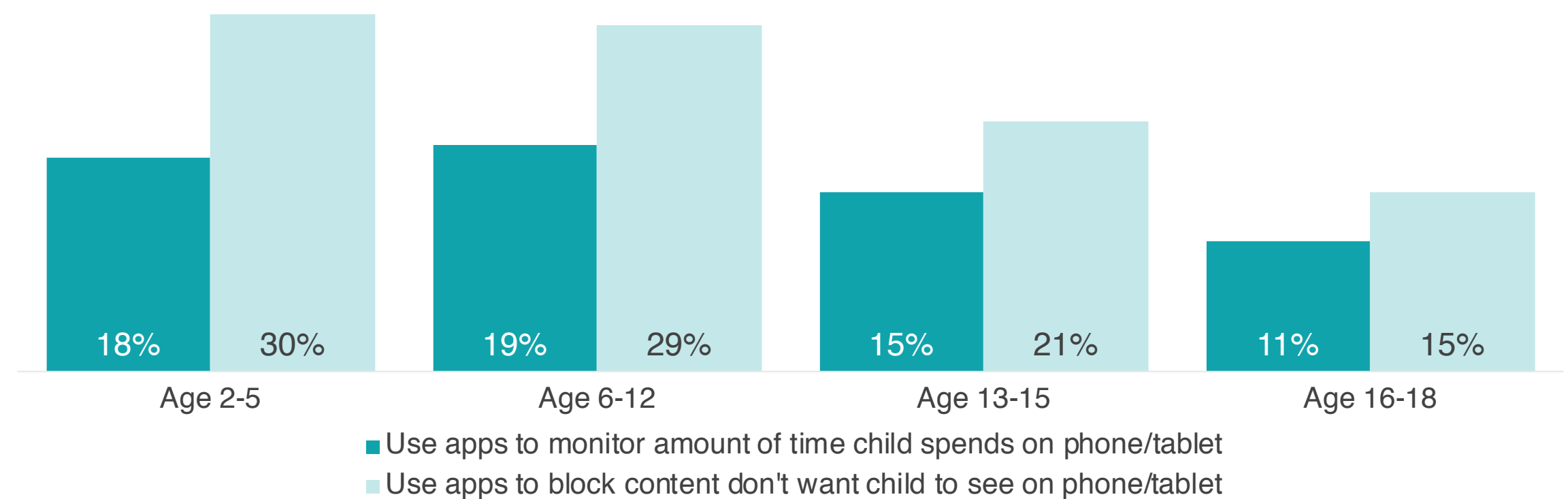
	Age 2-5	Age 6-12	Age 13-15	Age 16-18
Use apps to monitor amount of time child spends on phone/tablet	18%	19%	15%	11%
Use apps to block content don't want child to see on phone/tablet	30%	29%	21%	15%

■ Use apps to monitor amount of time child spends on phone/tablet
■ Use apps to block content don't want child to see on phone/tablet

	Global	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
I use apps/software to monitor the amount of time my child spends on phone/tablet	**16%**	16%	16%	16%	10%	7%	7%	10%	30%	23%	21%	18%
I use apps/software to block content I don't want my child to see on phone/tablet	**24%**	23%	27%	28%	12%	13%	17%	16%	31%	39%	33%	21%

CONTROL OR TRUST?

Use of monitoring apps varies from household to household, and is driven in no small part by parents' approach to parenting. Some parents take every opportunity to check in on what their children are doing online, what they post or text. For them, monitoring apps is another tool in their toolbox to keep close tabs on their children's behaviors. Other parents take an approach based on self-policing and trust. These parents focus on teaching values, as opposed to trying to control their devices.

"

"Everything – our laptops, smart TV, our phones – is connected to Norton Family. It's an app that actually tracks websites. Ever since Vincent was 12, my wife and I walked in on him. He was on his phone and he was looking at stuff he wasn't supposed to be looking at. Since then we basically have tracked everything in the house. We get weekly updates, emails, of different websites."

FATHER OF 13-15 YEAR OLD

"

"I have a good kid. I trust her and I allow her to do whatever she wants. She's a responsible good kid. She does chores. She works for her own money. If she wants a video game, she could purchase her own. I'm really lax with my things. She's a good kid. I don't have to worry about her at all."

MOTHER OF 13-15

LACK OF FAITH IN MONITORING TOOLS

Many lack faith in parental control apps and tools. Parents offered many anecdotes about children turning off the controls or getting around them.

Children, too, often described how they would trick their parents, getting past or shutting off parental controls. Others are frustrated with the parental control apps they have: parents find them confusing and not user-friendly. Many bemoan the fact that in our day and age there are no universal solutions for multiple devices their kids use. Others complain that this is yet another responsibility being added to their already full plates.

"I had an app on my daughter's phone, and the next thing I know, she can get right around it with no problem. I had time limits on it and she can get right around it."

MOTHER OF 9-12 YEAR OLD

"No matter what you do, they're going to find a way."

FATHER OF 9-12 YEAR OLD

"That's a full-time job. Having to come home after work and do all this work. Look through everything."

MOTHER OF 13-15 YEAR OLD

"There's one parental control for your Amazon, and there's another one for Netflix. There are so many different ones, and it becomes basically just a pain in the ass to remember to set them, and then my daughter's every five minutes asking me for the PIN for her Amazon tablet because the screen timed out. So, you're left just relying on, 'OK, I told you, only do this.' And you just hope that they're doing the right thing, but hope is one thing, and it makes me nervous just to rely on that."

FATHER OF 9-12 YEAR OLD

TRUST IS CONTINGENT ON GOOD BEHAVIOR

Parents report that the level of device control is often contingent on the child's management of their responsibilities. If they complete their schoolwork, get to school on time, get the grades, do their chores - then parents tend to reward them by being less controlling of their device usage. In addition, if their children have limited free time due to being active in sports or groups like Girl Scouts, then parents say they are more lenient about device usage when their kids do manage to get free time.

"If I'm able to finish my homework or if I did it at school, they'll just let me be on it when I have my free time. They know I already worked hard on trying to get my stuff done."

ELEMENTARY SCHOOL GIRL

_____

"I've always been like, if your grades are good and your chores are down, then it's a free-for-all."

MOTHER OF 13-15 YEAR OLD
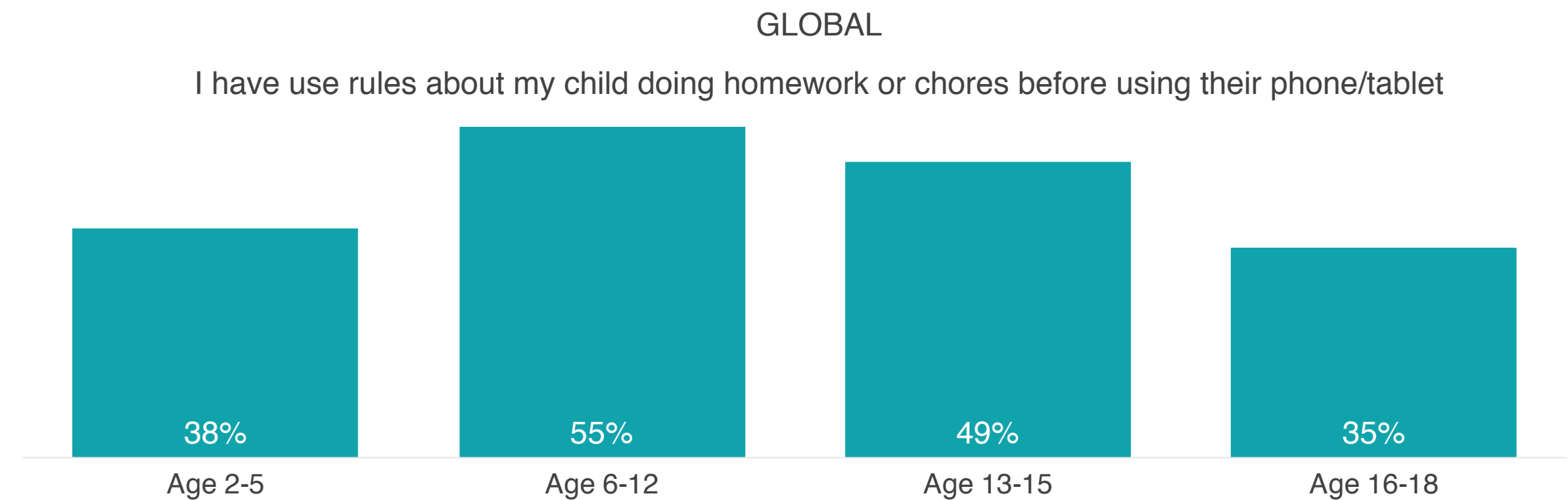
GLOBAL
I have use rules about my child doing homework or chores before using their phone/tablet

Age 2-5	Age 6-12	Age 13-15	Age 16-18
38%	55%	49%	35%

	Global	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
I have rules about my child doing homework or chores before using their phone/tablet	**44%**	41%	44%	57%	28%	46%	29%	35%	42%	53%	61%	50%
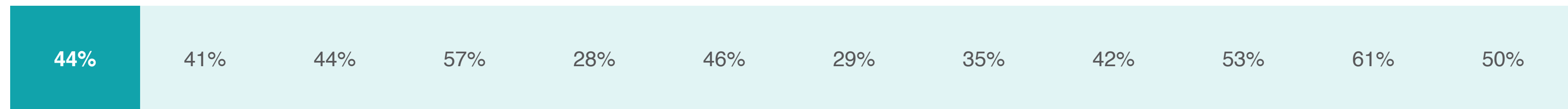
FINDING ALTERNATIVE ACTIVITIES

A sure way to keep kids away from devices is to keep them busy. Parents whose kids are enrolled in sports and other afterschool activities tend to have a better balance between tech and unplugged times. Many parents find other ways to keep their families busy and together: going for a walk, going out to eat, going to the mall, or having a movie night at home.

"I think you have to keep a good balance, you have to keep your kids active in sports and other things too because they're doing technology in school as well as at home. You have to tell them, OK, soccer practice today, you're not going to stay on your Chromebook just because you didn't have school today, you have to balance it out."

MOTHER OF 13-15 YEAR OLD

"I think that if they didn't have sports and things to go to after school, they would choose to play with the Xbox and do technology stuff. I mean, even in my neighborhood - we have a lot of kids, and they do come outside and they play basketball and run around."

MOTHER OF 9-12 YEAR OLD

"You have to find that balance to pull them away from it, that's why with my family, out biggest thing is us leaving the house. Once we leave the house, it's like a break from technology. I want to take them somewhere where they can enjoy the outdoors, and not be so dependent on it."

FATHER OF 6-8 YEAR OLD

"When it was springtime and summer, when we got home from work and from school, after dinner, we would walk to the park or we would take a bike ride instead of just her finishing dinner and using her tablet. She really didn't have to do that because she could just go outside. That fills the time."

MOTHER OF 9-12 YEAR OLD

TALKING TO KIDS ABOUT BALANCE

Discussing healthy ways of using technology with children is correlated with families' wellbeing. However, only 42% of parents (globally) report having these conversations with their kids often or all the time, with the lowest incidence in Japan (11%).

"

"My 15-year old asked me why I am the way I am with him and his technology. It was a simple answer. I told him, 'We're not promised tomorrow, dude. Do you really want to be stuck in your video game, and then the next day, we're gone? We have to enjoy the moments that we have with each other, and being on your tablet or playing video games, how is that getting us closer? How is that getting me to get to know you better?'"

FATHER OF 15 YEAR OLD

GLOBAL
My child and I talk about healthy ways to use digital technology (% often/all the time)
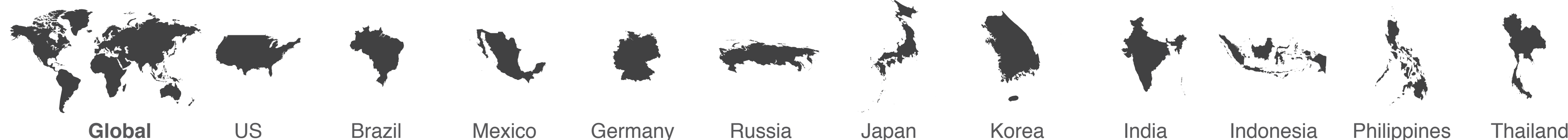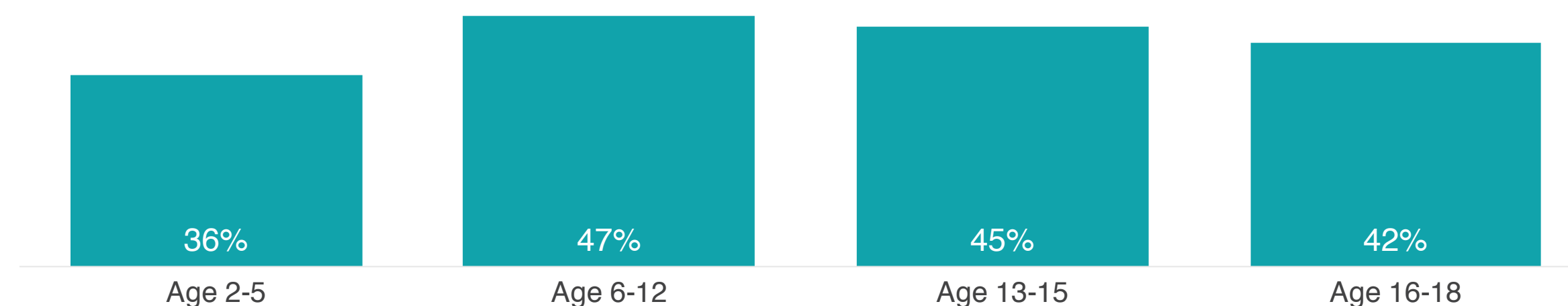
Age 2-5	Age 6-12	Age 13-15	Age 16-18
36%	47%	45%	42%

	Global	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
My child and I talk about healthy ways to use digital technology (often/all the time)	42%	39%	54%	56%	40%	31%	11%	30%	64%	54%	52%	38%
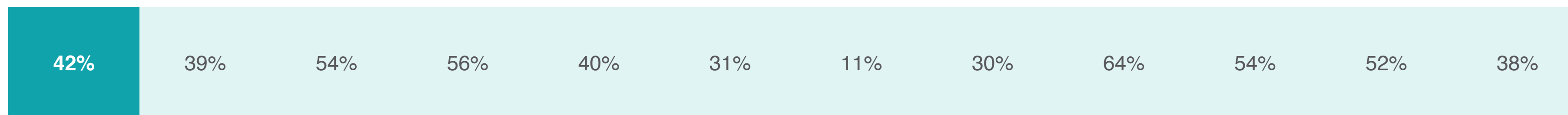
MODELING BEHAVIOR

Parents recognize that their family's digital wellbeing is inextricably linked to their own digital behaviors. Many parents participating in the qualitative research admitted that they are poor role models in that respect to their kids. Some admit spending too much time on their own devices; others prefer to avoid conflict with their children or to prolong the amount of quiet time they enjoy while their children are busy with their devices.

"It goes a long way for a kid knowing that their parent is actually paying attention to what they're doing. My oldest son is in guitar lessons. When we take him, I make it a point that I leave my phone in my car. I'm paying attention to what he does. Because when he comes out, I can be like, 'Damn, you sounded really good. I liked that key that you hit.' Then he's thinking, 'Wow, you were actually paying attention to me.' Instead of watching NFL Network on my phone, while he's in there, not caring. It gives us something to talk about."

FATHER OF 13-15 YEAR OLD

"You don't want to use that technology as an excuse to neglect your parenting duties. You don't want the technology to be the parent for your kid. You have a responsibility as a parent to do something. So, if your kid's always crying and you think, just give them the iPad, it's going to shut them up, and like, you know, out of sight out of mind,– it's not a healthy situation, it's not a healthy relationship. You have to be the parent, you have to set your limits."

FATHER OF 6-8 YEAR OLD

"I think it's about managing my time more, trying to be there more instead of relying on the crutch of technology that's going to help me parent them."

FATHER OF 9-12 YEAR OLD

"The new Apple phone has the screen time, and I have to be honest with you – I have it off. I know with all the work I do on my phone, I'm never going to look at the screen time to see and say 'Oh man, I really spent a lot of time on my phone.'"

MOTHER OF 2-5 YEAR OLD

———————————————

"I don't want to say [the app] is useless, but I think it is only going to tell me what I know – that I am on it too much."

MOTHER OF 2-5 YEAR OLD

———————————————

"I already feel bad. I do. I have the mom guilt. I feel like I'm on the phone too much. I'm not spending enough time with the kids. Sometimes with my little one – I'll have her next to me, and I am holding her and I'm looking this way [on the phone] because I'm trying to still work. But I want to spend time with my kids. I have to find a way to prioritize and how to balance things better. That, I think, is more on me than a phone or an app. It is just something I need to do for me and figure it out."

MOTHER OF 2-5 YEAR OLD

PARENTS STRUGGLE WITH SELF-REGULATION

Many parents would willingly admit that digital self-regulation is not their strongest suit.

- Only 14% of parents in Japan, 18% in Russia, and 20% in Germany set limits on their use of devices
- Even fewer use monitoring apps to keep track of their device usage (7% in Japan, 5% in Russia, and 8% in Germany).

Some parents find monitoring apps of little use: if anything, the apps aggravate parents who already feel guilty for diverting their attention from kids to screens.

	Global	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
I set limits on how much time I can spend on my phone or tablet	33%	23%	37%	44%	20%	18%	14%	32%	41%	43%	56%	31%
I use apps/software to monitor the amount of time I spend on my phone or tablet	16%	16%	15%	15%	8%	5%	7%	8%	30%	25%	26%	17%

FEELING OVERWHELMED

Families are interested in finding a balanced way to use technology, but they are overwhelmed by the sheer pace of developments in digital technology. They also receive mixed messages and signals regarding the benefits and risks of digital technology to their kids' health and development – messages that often fail to comport to their own experiences and judgment.

Global	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
60%	52%	51%	42%	52%	42%	60%	67%	84%	62%	85%	73%
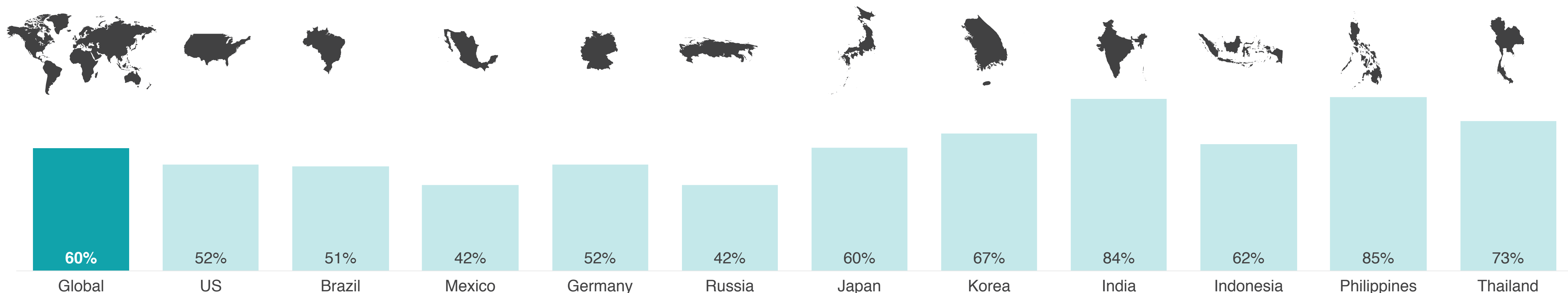
I feel overwhelmed by the constant changes and developments with digital technology
(% always/often/sometimes)

"It's hard because everything is in its infancy. I watch movies and I'm like, 'That guy's using a payphone. When was that movie?' That came out in '97. How long does it take for a study to actually come up with some answers or anything around that, saying, 'This is how it's going to affect your kids?' Everything is in its infancy. We really don't know."

PARENT OF 13-15, PHOENIX

PARENTS ASK FOR HELP

Parents would welcome help with finding the balance of integrating digital technology into their lives.

Interest in learning more about how to use digital technology to improve family wellbeing is significantly higher among among those who already use monitoring apps and among early adopters. Current behaviors are usually the best predictors of future behaviors.

Parents know that they need help: some just don't know what it is that they need help with.

"You can Google anything, but what do you Google?"
FATHER OF 13-15 YEAR OLD

"I honestly think that – I don't know what particular company, but there could be a company who could come and say, 'These are the good things, these are the bad things, but the good can outweigh the bad and at least balance each other.'"

MOTHER OF 2-5 YEAR OLD

"Sometimes, outside sources are better when you're trying to juggle a busy life and you're just trying to give you three year old your tablet so that he will just give you some quiet time – if there was somebody who said, 'Maybe you can try this, instead of doing that.' I would be with you in that."

MOTHER OF 2-5 YEAR OLD

"I wish someone could just come in here, take a look at this Digital Wellbeing, and tell us what to do."

MOTHER OF 6-12 YEAR OLD
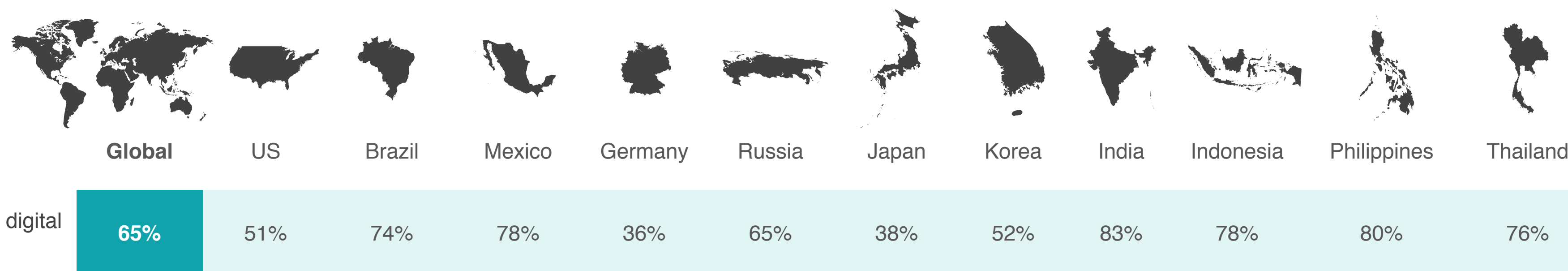
	Global	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
I would like more information about how to use digital technology to improve my family's wellbeing	65%	51%	74%	78%	36%	65%	38%	52%	83%	78%	80%	76%

THE SECRET SAUCE OF DIGITAL WELLBEING

Every family uses all or some of the following ingredients – in various doses and combinations – to arrive at the optimal recipe for *their* digital wellbeing. Many families are still at work.
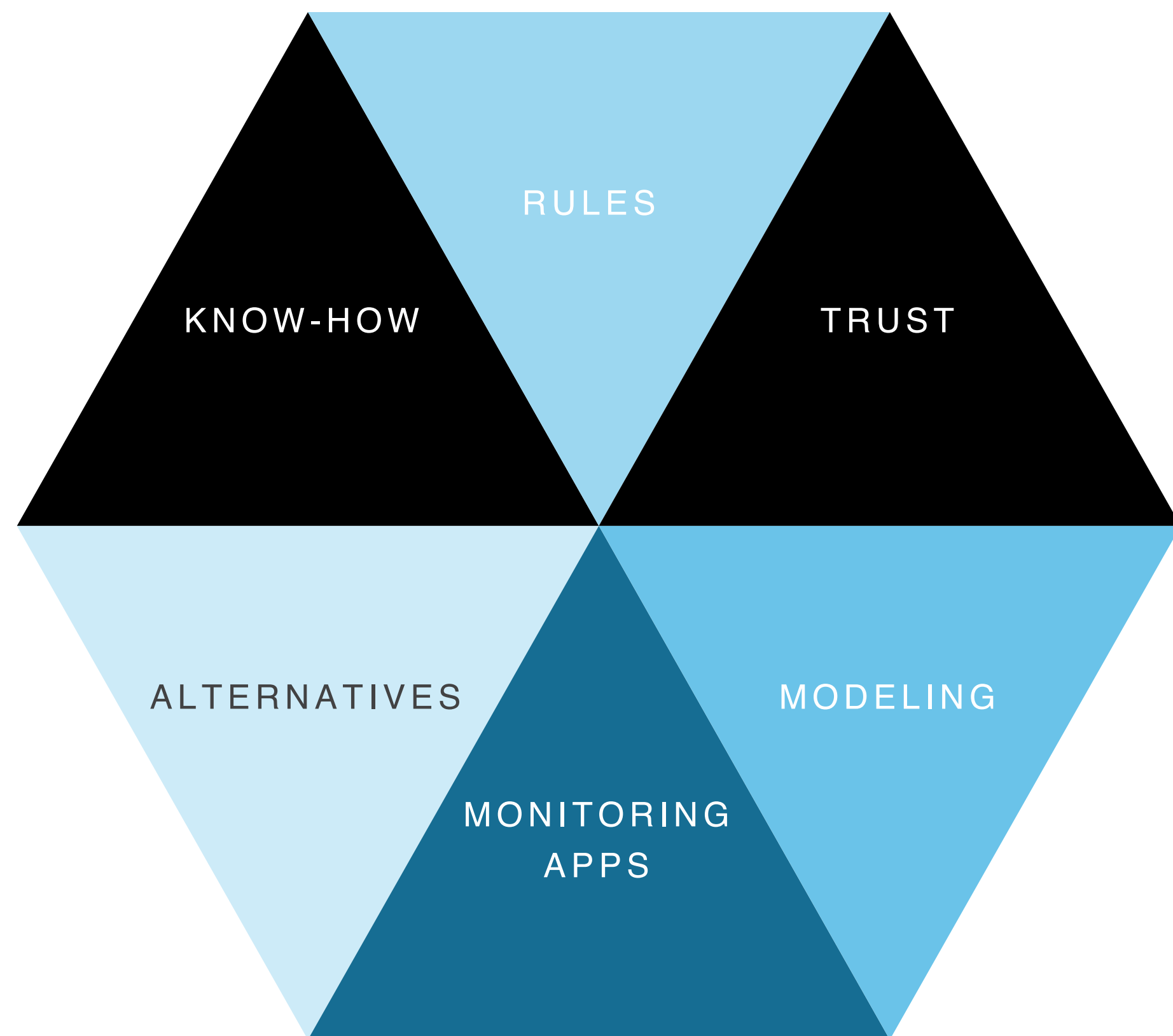
RULES

Parents impose rules regarding their child's use of devices

ALTERNATIVES

Families keep themselves busy with sports, afterschool activities, the outdoors, and disconnected family time

MONITORING APPS

Parents use parental control apps to monitor their kids' digital activities

MODELING

Parents strive to set the example of proper digital usage, to be the role models for their kids, but some struggle with self-regulation

TRUST

Families rely on an honor system for device usage, so long as the child keeps up his or her responsibilities (grades, chores)

KNOW-HOW

Parents try to stay abreast of studies and expert recommendations regarding the optimal usage of digital devices

4

DIGITAL WELLBEING OF FAMILIES

PERSONAS

WE HAVE IDENTIFIED FOUR DISTINCT FAMILY PERSONAS

We have conducted an in-depth segmentation analysis in order to identify different types of families with respect to their relationship to digital technology and its role in their families' wellbeing. We have examined the interaction among several factors:

USAGE OF DIGITAL TECHNOLOGY IN FAMILIES' LIVES

PERCEIVED BENEFITS OF DIGITAL TECHNOLOGY FOR FAMILIES

STRESS AND TENSION ASSOCIATED WITH DIGITAL TECHNOLOGY

FAMILY WELLBEING

FAMILY STRESS

The segmentation analysis identified common segments across all eleven countries.

DETERMINANTS OF FAMILY PERSONAS

Two main factors – technology benefits and technology stress – emerged as key in distinguishing segments of families, each encompassing a range of measures:

	BASIC NEEDS	PRODUCTIVITY	PERSONAL GROWTH	CONNECTION
TECHNOLOGY BENEFITS	• Keeping my family safe	• Keeping track of my child's schedule • Keeping in touch with my child's school • Trying new activities for my family to do together	• My child's intellectual development • My child's social life • My child's emotional wellbeing • My emotional wellbeing • My social life	• Staying in touch with extended family and friends • Feeling connected as a family • Spending "in real life/IRL" time together • My relationship with my spouse/significant other • Balancing "alone" and "together" time for my family
TECHNOLOGY STRESS	• I worry about my child being exposed to inappropriate or dangerous content when using digital technology	• My child stays up late to use digital technology • My child skips meals so that he/she can play videogames or use smartphone or tablet. • My child wastes time using smartphone, tablet or videogames. • I stay up late to use digital technology	• I worry that my **child** is becoming addicted to his/her smartphone. • I worry that **I** am becoming addicted to my smartphone. • I worry that **my spouse** is becoming addicted to his/her smartphone.	• The use of digital technology is a source of tension or disagreements in my family. • My child and I have arguments about my **child's** use of technology. • My child and I have arguments about **my** use of technology.

MEET FAMILY PERSONAS

	STRIVERS	WELL-ADAPTED	UNHAPPY CAMPERS	COASTERS
Family motto	"If you want to get something done, give it to a busy person"	"We've got this!"	"Treading water"	"Why should I worry?"
Technology outlook	"High stress, high reward"	"Latest and greatest"	"If it's not part of the solution, it's a problem"	"Meh"
Technology benefit	High	High	Low	Low
Technology stress	High	Low	Moderate	Low
Parent technology usage	High	High	Low	Low
Child technology usage	High	Moderate	Low	Low
Family activity level	High	High	Low	Low
Family wellbeing	High	High	Low	Low
Family stress	High	Low	Moderate	Low
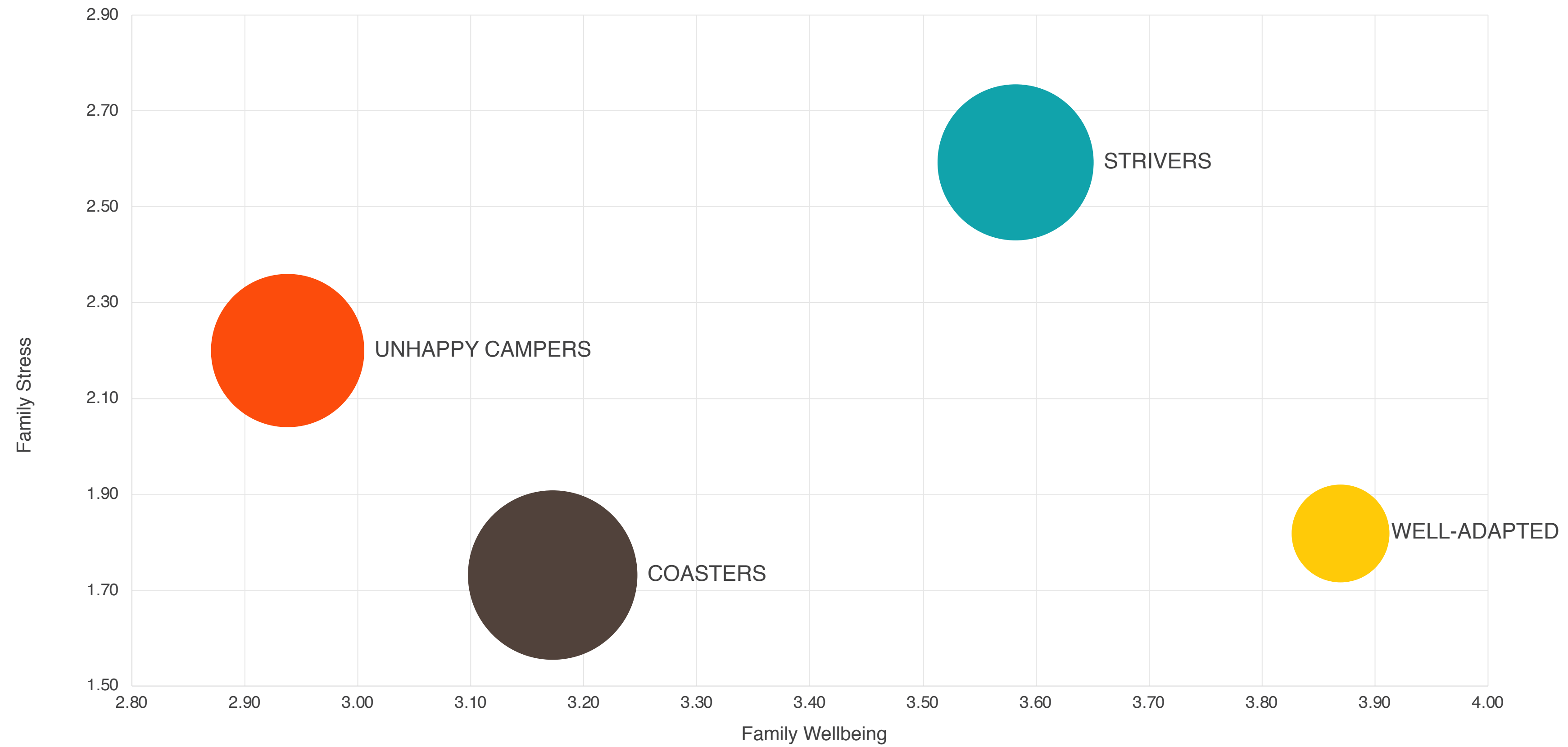
PERSONAS

FAMILY WELLBEING AND STRESS

The size of balloons corresponds to the size of the segment in the population

	STRIVERS	WELL-ADAPTED	UNHAPPY CAMPERS	COASTERS
US	23%	11%	24%	41%
Brazil	46%	12%	23%	19%
Mexico	25%	17%	21%	37%
Germany	14%	4%	32%	50%
Russia	10%	5%	33%	52%
Japan	11%	3%	41%	45%
Korea	19%	3%	41%	37%
India	53%	18%	16%	13%
Indonesia	32%	25%	21%	21%
Philippines	42%	16%	17%	25%
Thailand	35%	7%	33%	25%
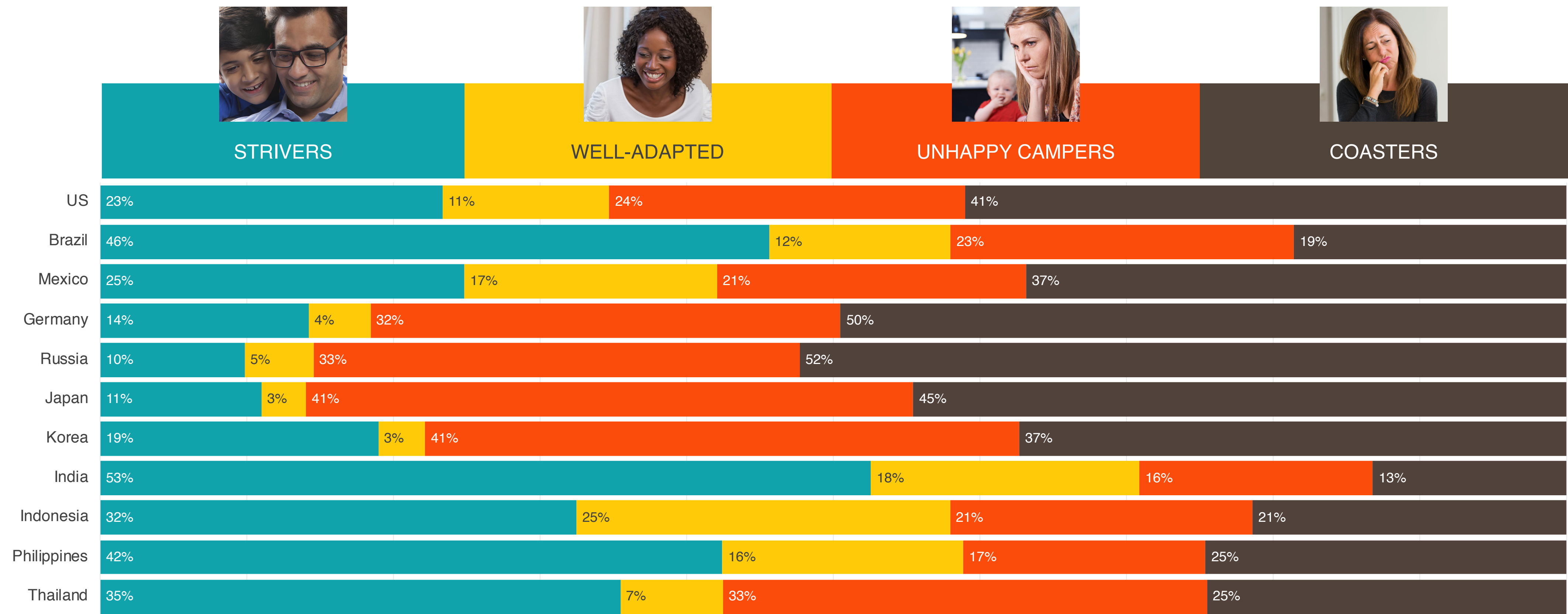
PERSONAS

FAMILY PERSONA DISTRIBUTION

All four segments exist in all countries, but vary in size.

STRIVERS

Strivers are go-getting, aspiring, restless, and achievement-oriented. High overlap with the new "aspirational class" – a cohort focused on self-improvement, self-education, and acquisition of cultural capital. They are stressed, but this stress is self-generated. A major concern is preparing their children to get ahead by making them well-rounded and active. Their devices are integral to their lives – as both stressors and de-stressors.

Size of persona by country:

US	23%
Brazil	46%
Mexico	25%
Germany	14%
Russia	10%
Japan	11%
Korea	19%
India	53%
Indonesia	32%
Philippines	42%
Thailand	35%

FAMILY PHILOSOPHY

• High emphasis on children's education and achievement

• Intense parenting style: active engagement in children's lives

• Busy lives: lots of school-related and recreational activities

• High aspirations for children lead to higher anxiety about their academic, social and emotional development

TECH PHILOSOPHY

• Tech enthusiasts with highly integrated tech homes

• Fully embrace the role of tech in every aspect of family live: safety, health, education, personal growth, productivity

• Leverage tech in parenting as a reward and punishment

• Tech is a source of stress and tension in the family but benefits of tech trump the drawbacks

UNMET NEEDS

• High interest in learning about the impact of technology on children

• High interest in learning how to balance tech with family priorities and digital wellbeing
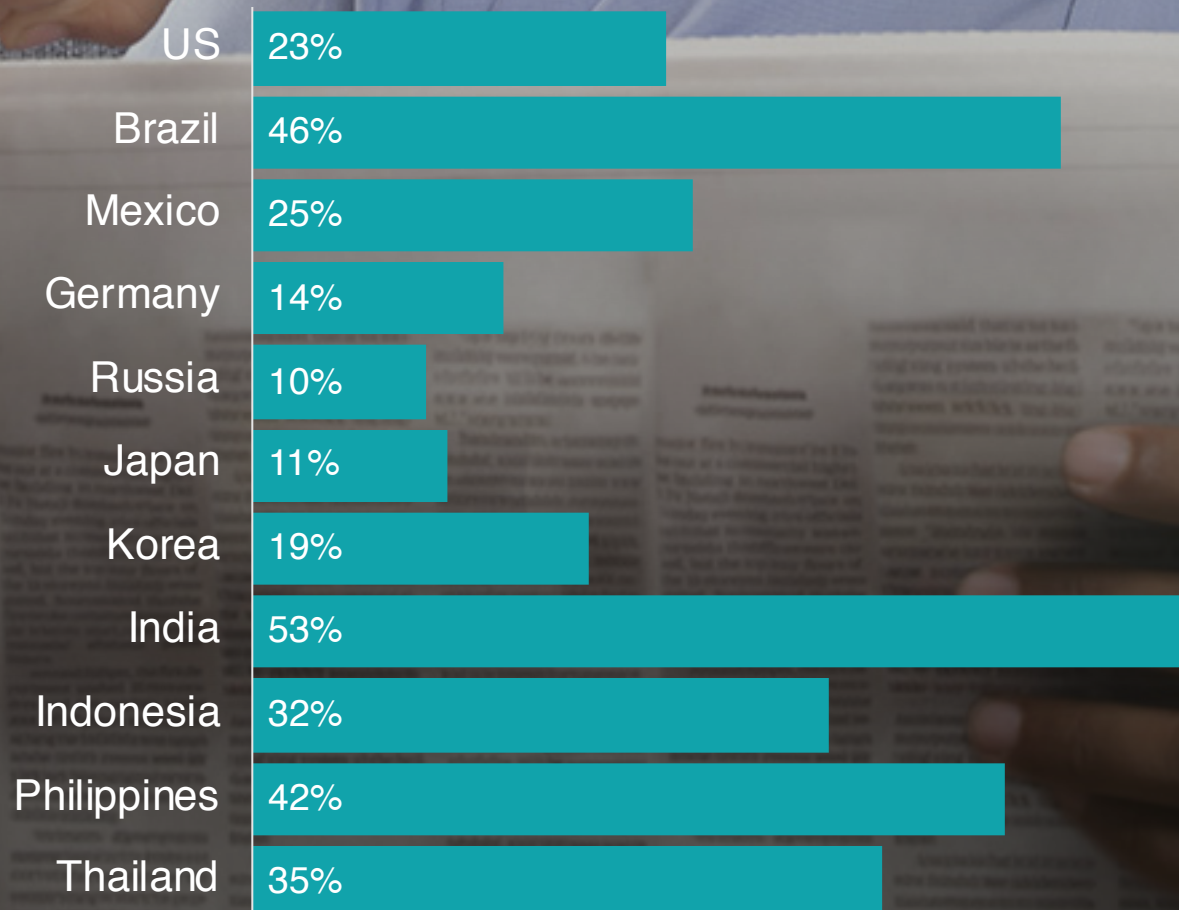
STRIVERS: GENERAL PROFILE

Strivers score high on the wellbeing index but they are also the most likely to report high levels of stress. Strivers are preparing their children to get ahead, making them well-rounded, giving them diverse experiences, prepping them for better schools. They are thus active in their children's school activities; they engage in many non-tech activities with their children; thereby further loading their already full schedules.

KEY DEMOGRAPHICS
Parents in this segment are the most likely to be:
- Under 40 years old
- In an urban area
- Employed full-time and with spouse/partner employed full-time
- Responding to survey questions about a school-age child

HIGH LEVEL OF FAMILY WELLBEING

More likely to be **highly satisfied** with the following areas of their life:
- Being financially secure
- Keeping physically fit
- Eating healthy
- Having "me" time

FREQUENT PARENT-CHILD ACTIVITIES

Most likely to do the following **daily** with their child:
- Participate in school activities
- Play sports
- Spend time outdoors
- Eat in a restaurant

HIGHEST LEVEL OF FAMILY STRESS

Most likely to say the following **describe their family**:
- Stressed out
- Always rushed for time
- Isolated or disconnected from each other.

They are **most likely** to say that they are highly concerned about their child's academic performance.

TEENS ARE STRESSED AND BORED

Teens in this segment are **most likely** to report the following:
- They are often bored
- Their family is stressed out

They are **less likely** to say that they can talk to their parents about anything.

STRIVERS: TECHNOLOGY PROFILE

Strivers frequently use digital tech to benefit themselves and their family, and they are the most frequent users of tech in their parenting. While tech brings joy to their lives, Strivers report the highest levels of stress from tech.

TECH AS SOURCE OF STRESS

Most likely to report frequently experiencing the following:

- Feel overwhelmed by the constant changes and developments with digital technology
- Use of digital technology is a source of tension or disagreements in family

Most likely to report that they often rely on their child for help understanding technology

TECH AT HOME	FREQUENT TECH ACTIVITIES
More likely to **own** the following devices: • Smart speaker • Smart security system **Most likely to own** an educational gaming/electronic learning platform	Most likely to use digital tech **daily** for the following: • Play video or other games • Shop online • Use health or fitness apps • Plan special events
PARENTING WITH TECH	**TECH PROVIDES PERSONAL BENEFITS**
Most likely to use digital tech **daily** for the following: • Use as a reward for child • Use to occupy/pacify child	Majority report that digital tech frequently does the following: • Brings joy to their life • Helps them relax and unwind

PERSONAS

WELL-ADAPTED

Well-adapted comprises a combination of early adopters, techies, and successful adapters; they seem to have more relaxed attitudes; they see tech as facilitating family closeness and more open communication; they enjoy clearer parameters on child usage coupled with more confident parenting.

FAMILY PHILOSOPHY

- High emphasis on nurturing and maintaining relationships with family and friends
- Children and family are a great source of happiness
- Parenting style values open communication and trust with child

TECH PHILOSOPHY

- Use and value digital tech for its positive impact on relationships with friends and family
- Cheerleaders for tech – they see themselves as early adopters and see digital tech as having a positive impact on many different aspects of their lives

UNMET NEEDS

- More opportunities to use cutting edge digital tech focused on enriching relationships with family and friends

Size of persona by country:

Country	%
US	11%
Brazil	12%
Mexico	17%
Germany	4%
Russia	5%
Japan	3%
Korea	3%
India	18%
Indonesia	25%
Philippines	16%
Thailand	7%
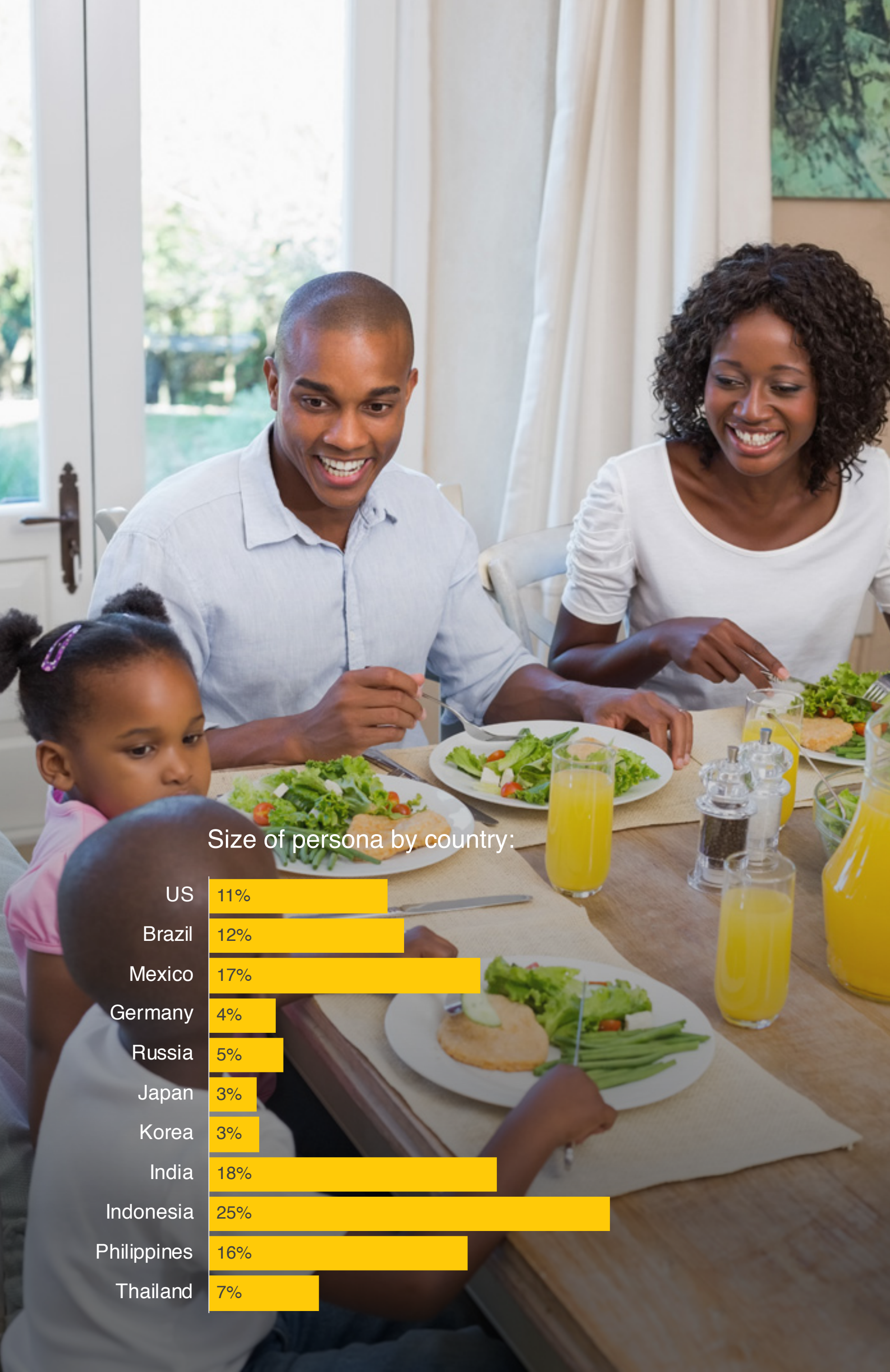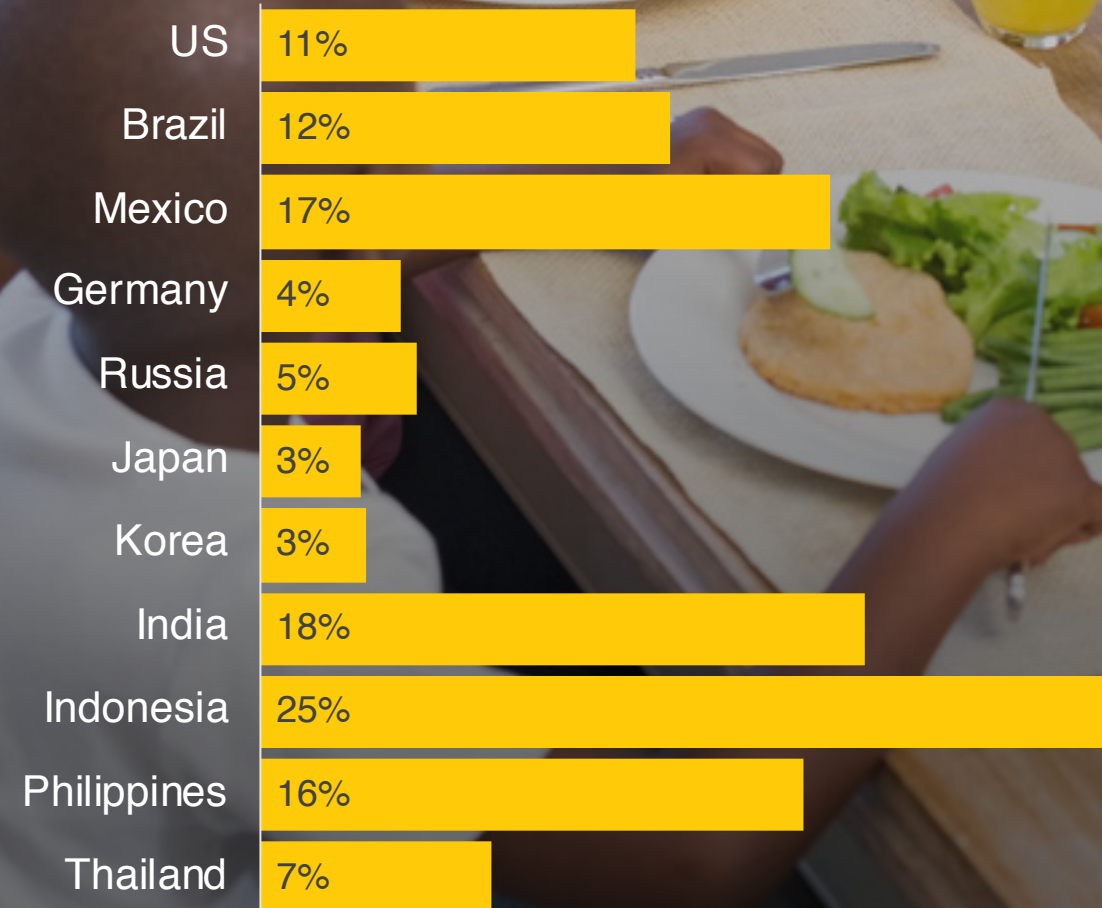
WELL-ADAPTED: GENERAL PROFILE

Well-adapted personas are happy with their family life and less likely to feel stressed out or disconnected. Their focus is on their relationships and they frequently do child-centered activities. Teens in this segment report the highest levels of family and school satisfaction.

KEY DEMOGRAPHICS
Similar to other segments on most demographics.

Parents in this segment are the most likely to have more than one child.

HIGH LEVELS OF FAMILY WELLBEING AND OPTIMISM

Most likely to say the following **completely describes** their family:
- Caring
- Happy

Most likely to **strongly agree**:
- They're optimistic about their child's future
- Relationship with their child brings them happiness

FREQUENT PARENT-CHILD ACTIVITIES

Most likely to **daily eat dinner at home** with their child.
Frequently do the following **daily** with their child:
- Do homework
- Learn and study new things
- Watch videos or movies at home

LOWER LEVELS OF FAMILY STRESS

Less likely to say the following **describe their family**:
- Stressed out
- Always rushed for time
- Isolated or disconnected from each other.

TEENS ARE FLOURISHING

Teens in this segment are **most likely** to be **highly satisfied** with the following:
- Their family life
- Their school life
- Their friendships

They are **most likely** to say they get along well with their parents.

WELL-ADAPTED: TECHNOLOGY PROFILE

Well-adapted personas consider themselves to be on the leading edge of tech. Their digital activities focus on relationships: connecting with family and friends.

TECH AT HOME	FREQUENT TECH ACTIVITIES
• Most likely to consider themselves an **early adopte**r. • Most likely to **own** a Smart TV/ Apple TV and many own a smart speaker.	• Most likely to use digital tech **daily** to **keep in touch with their family**. • Most likely to have child who uses digital tech **daily** to **do homework** on their smartphone or tablet:
PARENTING WITH TECH	TECH ESPECIALLY BENEFICIAL FOR CONNECTING WITH FAMILY
• Family rules focus on when child can use devices and doing homework before using smartphone or tablets. • Most likely to trust their child to follow family's rules about what sites/shows they are not allowed to see. • Most likely to use apps/software to block content that they don't want child to see	Most likely to say digital tech has a **positive impact** on the following: • Staying in touch with extended family • Feeling connected as a family • Spending "in real life/IRL" time together • Keeping in touch with child's school • On their own social life

PERSONAS

UNHAPPY CAMPERS

Unhappy Campers appear frustrated, discouraged, and aggravated with many aspects of their lives, with less trusting, happy, or functional families; and tech is implicated in this dour situation.

Size of persona by country:

Country	%
US	24%
Brazil	23%
Mexico	21%
Germany	32%
Russia	33%
Japan	41%
Korea	41%
India	16%
Indonesia	21%
Philippines	17%
Thailand	33%

FAMILY PHILOSOPHY

- Family is not a strong source of comfort or refuge
- The parent-child relationship is characterized by a lack of trust and communication
- Parents are spending less time on activities with their children, particularly on ones that have been linked to children's wellbeing, such as regularly eating meals together or spending "unplugged" time together

TECH PHILOSOPHY

- While digital tech is a part of their lives, it is not viewed as particularly helpful for their children or themselves
- Digital tech is perceived to have a negative impact on family relationships and spending time together

UNMET NEEDS

- Knowledge about how to use digital technology in a healthy manner
- Support in how to talk about healthy ways to use digital technology with their child
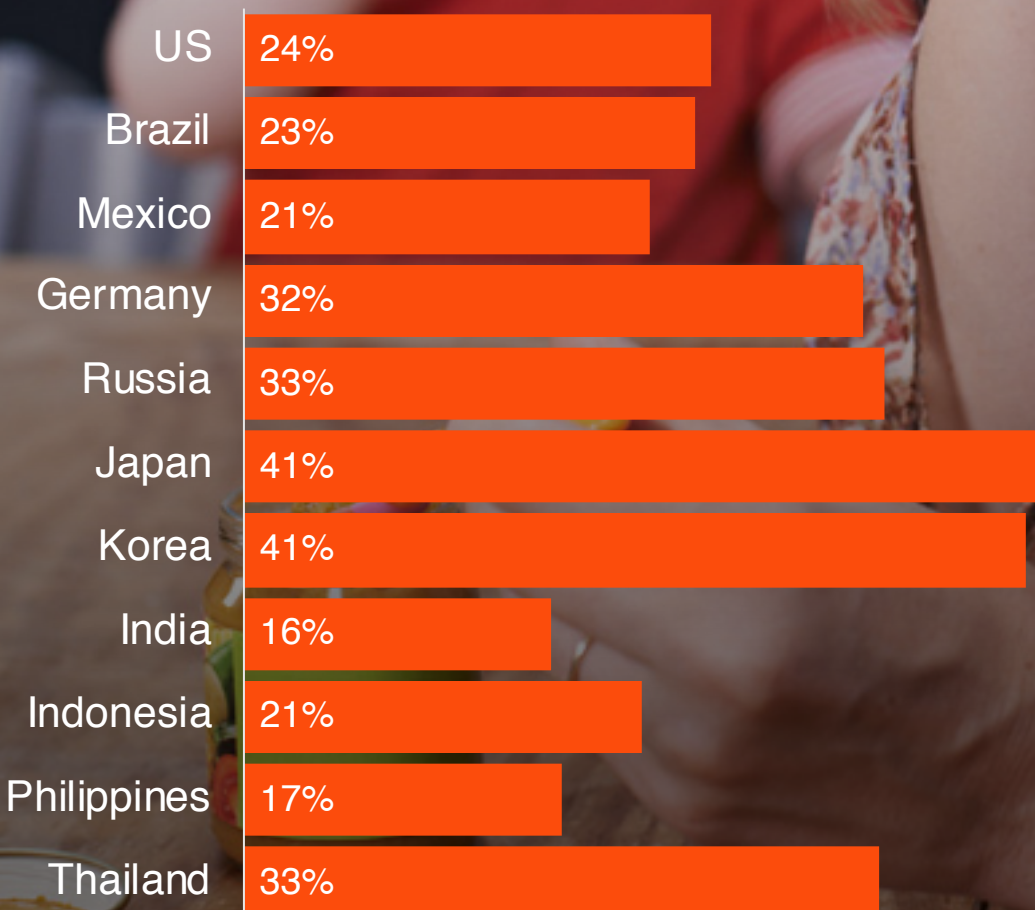
UNHAPPY CAMPERS: GENERAL PROFILE

Unhappy Campers are struggling. They are less satisfied with their basic needs and less happy with their family relationships. They participate less frequently in child-centric activities. And their teens report the lowest levels of wellbeing.

KEY DEMOGRAPHICS
Similar to other segments on most demographics.

LOWEST LEVEL OF FAMILY WELLBEING AND OPTIMISM

Least likely to be **highly satisfied** with the following areas of their life:
- Spending time with family
- Being a role model for children
- Being financially secure
- Being safe
- Having "me" time

Least likely to say the following **describes** their family:
- Caring
- Happy

Least likely to **agree**:
- They're optimistic about their child's future
- Relationship with their child brings them happiness

LESS FREQUENT PARENT-CHILD ACTIVITIES

Least likely to do the following **daily** with their child:
- Eat dinner at home
- Learn and study new things
- Spend "unplugged" time together

LOW LEVEL OF FAMILY COMMUNICATION

Least likely to say the following about their child:
- Child shares with them what is going on in their life.
- Knows where child is at all times.

TEENS ARE STRUGGLING TOO

Teens in this segment are **least likely** to be highly satisfied with the following:
- Their family life
- Their school life
- Their life overall

They are **least likely** to describe their family as happy or caring.

They are **least likely** to say that they get along well with their parents.

UNHAPPY CAMPERS: TECHNOLOGY PROFILE

Unhappy Campers have the most negative views about the role of tech in their family life. They are the most likely to report that tech is not a help to their child and that it has a negative impact on their family time and relationships.

LESS FREQUENT TECH ACTIVITIES, PARTICULARLY TO CONNECT WITH FAMILY	LACK OF EQUILIBRIUM IN FAMILY TECH USE	TECH HAS NEGATIVE IMPACT ON FAMILY LIFE
Least likely to use digital tech **daily** for the following: • Keep in touch with family • Send or receive text messages with family or friends	• Least likely to report that their family frequently has a good balance between using digital technology and staying unplugged. • Least likely to have family rule of no devices during dinner	Most likely to say digital tech has a negative impact on the following: • Feeling connected as a family • Spending "IRL" time together • Balancing "alone" and "together" time as a family • Relationship with spouse

PARENTING WITH TECH	TECH IS NOT HELPING CHILD
Least likely to report the following: • Child tells them what they see/do online • Trust their child to follow family rules on sites/shows they are allowed to see • Frequently talk with child about healthy ways to use digital technology	Least likely to say digital tech frequently does the following: • Helps child succeed with schoolwork • Helps child gain skills and knowledge • Is a productive use of their child's time

COASTERS

Coasters appear to be muddling through, okay with life as it is; their current wellbeing is not ideal, but it is not so bad as to stress them; they have dropped out of the rat race in some senses, and are less vested in tech and less concerned with its role in their lives.

Size of persona by country:

Country	%
US	41%
Brazil	19%
Mexico	37%
Germany	50%
Russia	52%
Japan	45%
Korea	37%
India	13%
Indonesia	21%
Philippines	25%
Thailand	25%

FAMILY PHILOSOPHY

- They are not overly worried about their children's wellbeing, academic achievement or friendships
- Parenting does not require them to be constantly immersed in their children's activities

TECH PHILOSOPHY

- Tech is not a parenting tool to be used to reward or pacify a child or keep track of or control their behavior
- Tech doesn't cause stress or tension, but nor does it provide joy or relaxation

UNMET NEEDS

- This segment does not currently look to tech for improving family wellbeing
- For members of this cohort, a more pertinent need is to increase utility of technology in their individual pursuits

COASTERS: GENERAL PROFILE

While they report lower levels of wellbeing than Strivers or the Well-adapted, Coasters do not report high levels of stress. Similarly their teens do not report family stress nor are they frequently bored.

KEY DEMOGRAPHICS
Parents in this segment are the most likely to be:
- Female
- In a small town or rural area
- Responding to survey questions about 2– 5 year-old child

LOWER LEVELS OF FAMILY WELLBEING, BUT LESS CONCERN	LESS FREQUENT PARENT-CHILD EXCURSIONS
Less likely than Strivers and Well-Adapted to report high levels of family wellbeing. Least likely to be **highly concerned** about the following: • Child is too social • Child is not social enough • Child's academic performance • Child's emotional well-being	Most likely **never** to do the following with their child: • Go to a movie theater • Play video or online games
LOWEST LEVEL OF FAMILY STRESS	**TEENS ALSO ARE LESS STRESSED OR BORED**
Least likely to say the following **describe their family**: • Stressed out • Always rushed for time • Isolated or disconnected from each other.	Teens in this segment are **least likely** to report that they are often bored and least likely to describe their family as stressed out or always rushed for time.

COASTERS: TECHNOLOGY PROFILE

Coasters are less reliant on tech for their family's wellbeing or in their parenting and, perhaps as a result, tech is less often a source of stress or tension.

Compared to other segments, digital tech is not seen as a source or joy or relaxation for their child.

LESS FREQUENT TECH ACTIVITIES	PARENTING WITH TECH
Less likely to use digital tech **daily** for the following: • Organize/ schedule family activities • Stay healthy • Keep track of information about child's school or schoolwork • Child is less likely to play video or other games on their smartphone/ tablet.	Most likely **never** to use digital tech for the following: • Use as a reward for child • Use to occupy/pacify child • Keep track of where child is using geolocation Least likely to monitor (with or without apps) their child's online behavior.
TECH IS NOT PARTICULARLY HELPFUL FOR CHILD…	…NOR IS TECH A SOURCE OF STRESS
Least likely to say digital tech frequently does the following: • Brings joy to child's life • Helps child relax and unwind	Least likely to report frequently experiencing the following: • Feel overwhelmed by the constant changes and developments with digital technology • Use of digital technology is a source of tension or disagreements in my family

5

DIGITAL WELLBEING OF FAMILIES
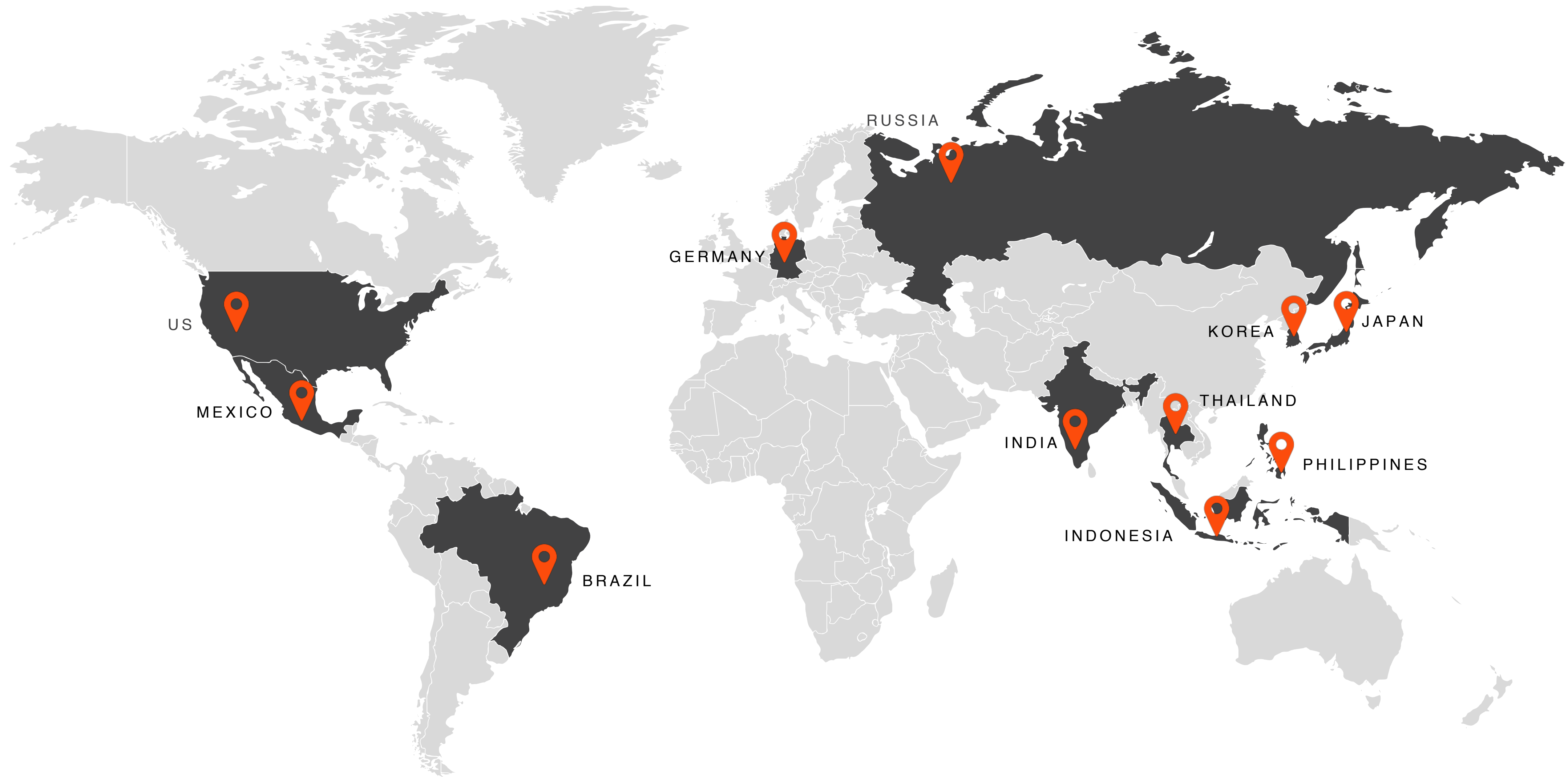
COUNTRY SUMMARIES

DIGITAL WELLBEING OF FAMILIES

COUNTRY SUMMARIES

COUNTRY DIFFERENCES

Families across the eleven countries included in this research share universal needs, desires and aspirations for their children's and family's wellbeing. Families also differ in their priorities, parenting styles, and their relationship to technology – both within each country and across countries. The intra-country family differences are reflected in the personas present in each country. The inter-country differences appear to be driven by the following factors:

- The economic development of the country
- The technology adaptation level
- Culture

The research strongly suggests that it is the interplay of these three factors, rather than any one dominant factor, that inform families' outlook on life and the role of digital technology in their lives. This is reflected in the fact that regional similarities are less pronounced than one would have expected: Japan shares more similarities with Russia than with neighboring Korea, and India shares more commonalities with Brazil than with Thailand.

NOTABLE OUTLIERS

Several countries stand apart – either because of their predominant personas or counter-intuitive combination of factors:

- India is the only country that scores high on virtually every index covered in this research, including high general family wellbeing and family stress levels, high technology benefits and technology stress scores, and high parental engagement scores.
- Japan is diametrically opposite of India, with the lowest scores on every dimension of family and technology wellbeing tested in the research.
- Russia aligns closely with Japan in scoring low on nearly most indices: like Japanese families, Russians score low on the general wellbeing index but do not seem to be too stressed about it. However, Russians appear to be more involved in their children's activities and have more trusted relationships and communications with their kids than do Japanese parents.
- Brazil presents the most puzzling of all cases: they are highly engaged in technology and recognize its benefits to their kids and their families, but they experience high levels of technology-related stress. However, their general family stress levels are low.
- US falls squarely in the middle in the distribution of country profiles, scoring in line with the global averages on most variables.

COUNTRY PROFILES

	US	Brazil	Mexico	Germany	Russia	Japan	Korea	India	Indonesia	Philippines	Thailand
Dominant persona	Coasters	Strivers	Coasters	Coasters	Coasters	Coasters / Unhappy Campers	Unhappy Campers / Coasters	Strivers	Strivers / Well Adapted	Strivers	Strivers / Unhappy Campers
Technology benefit	Moderate	High	High	Low	Low	Low	Low	High	High	High	Moderate
Technology stress	Moderate	High	Low	Low	Low	Low	Moderate	High	Moderate	Moderate	High
Family technology usage	Moderate	High	Moderate	Low	Low	Low	Moderate	High	High	High	High
Family activity level	Moderate	Moderate	Moderate	Moderate	Moderate	Low	Low	High	Moderate	High	Low
Family trust + communication	Moderate	Moderate	High	Moderate	Moderate	Low	Low	High	High	High	Moderate
Family wellbeing	Moderate	Moderate	High	Moderate	Low	Low	Low	High	Moderate	High	High
Family stress	Moderate	Low	Low	Low	Low	Low	Moderate	High	Low	Low	Moderate
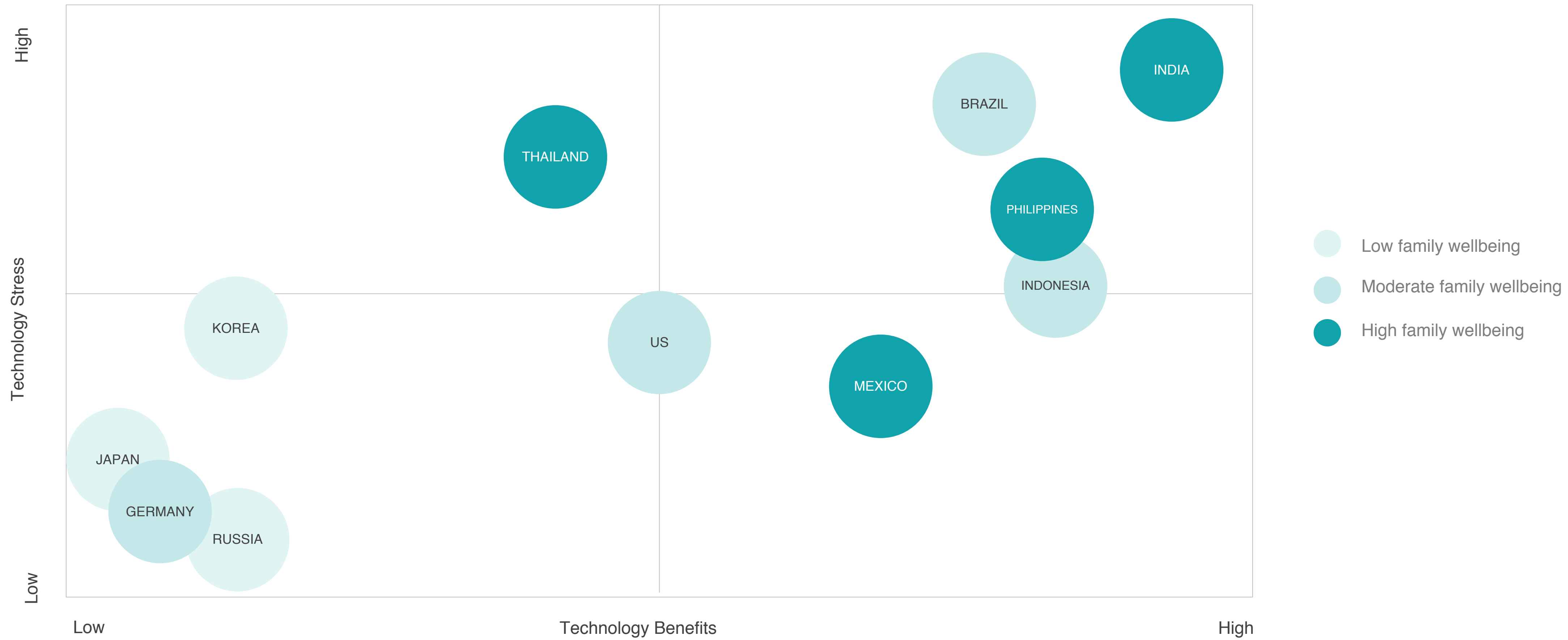
COUNTRY SUMMARIES

COUNTRY TECHNOLOGY PROFILES

DIGITAL WELLBEING OF FAMILIES

USA

US SAMPLE

52% / **48%**

CHILDREN

52% / **41%**

SMARTPHONE OS
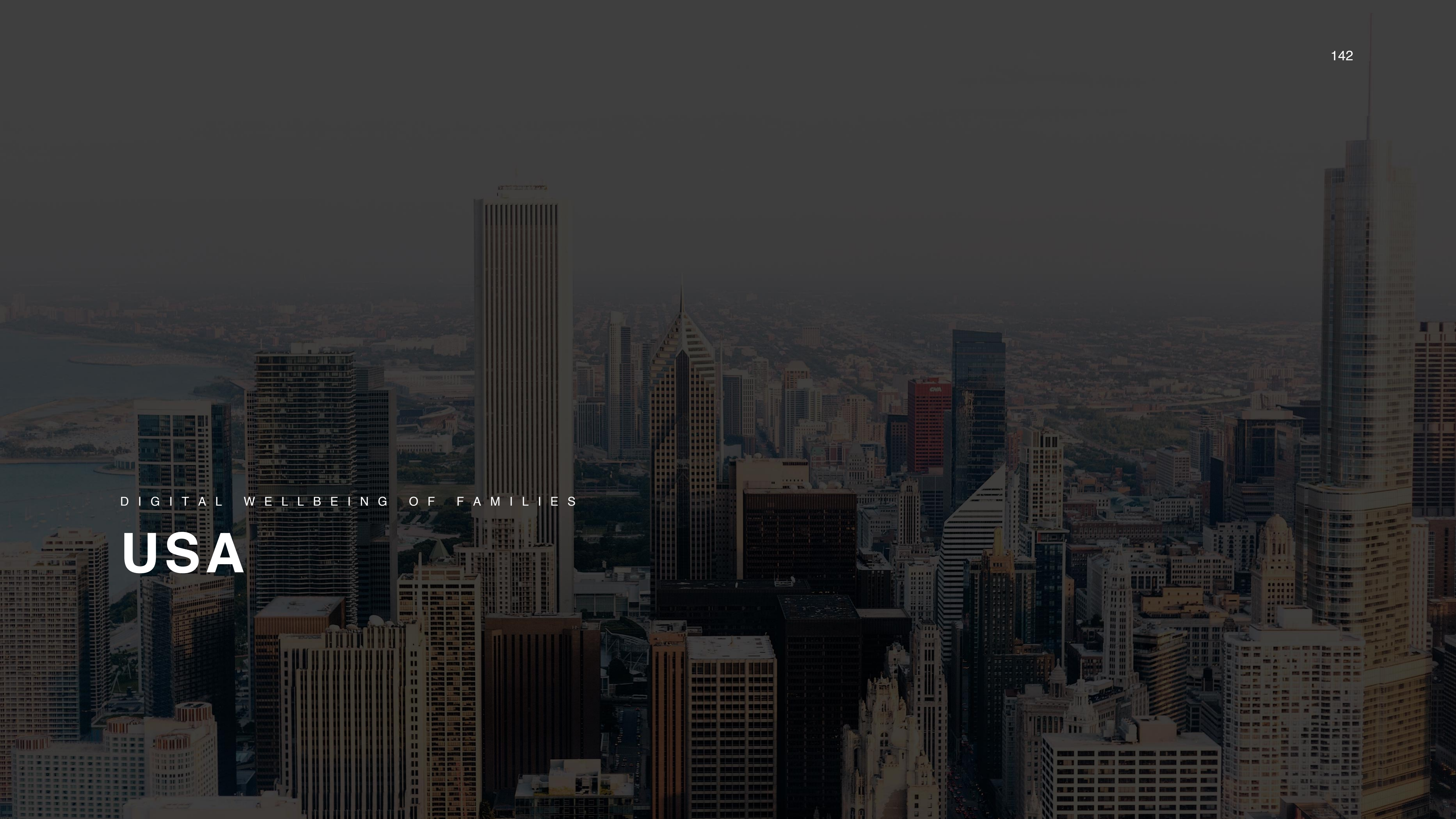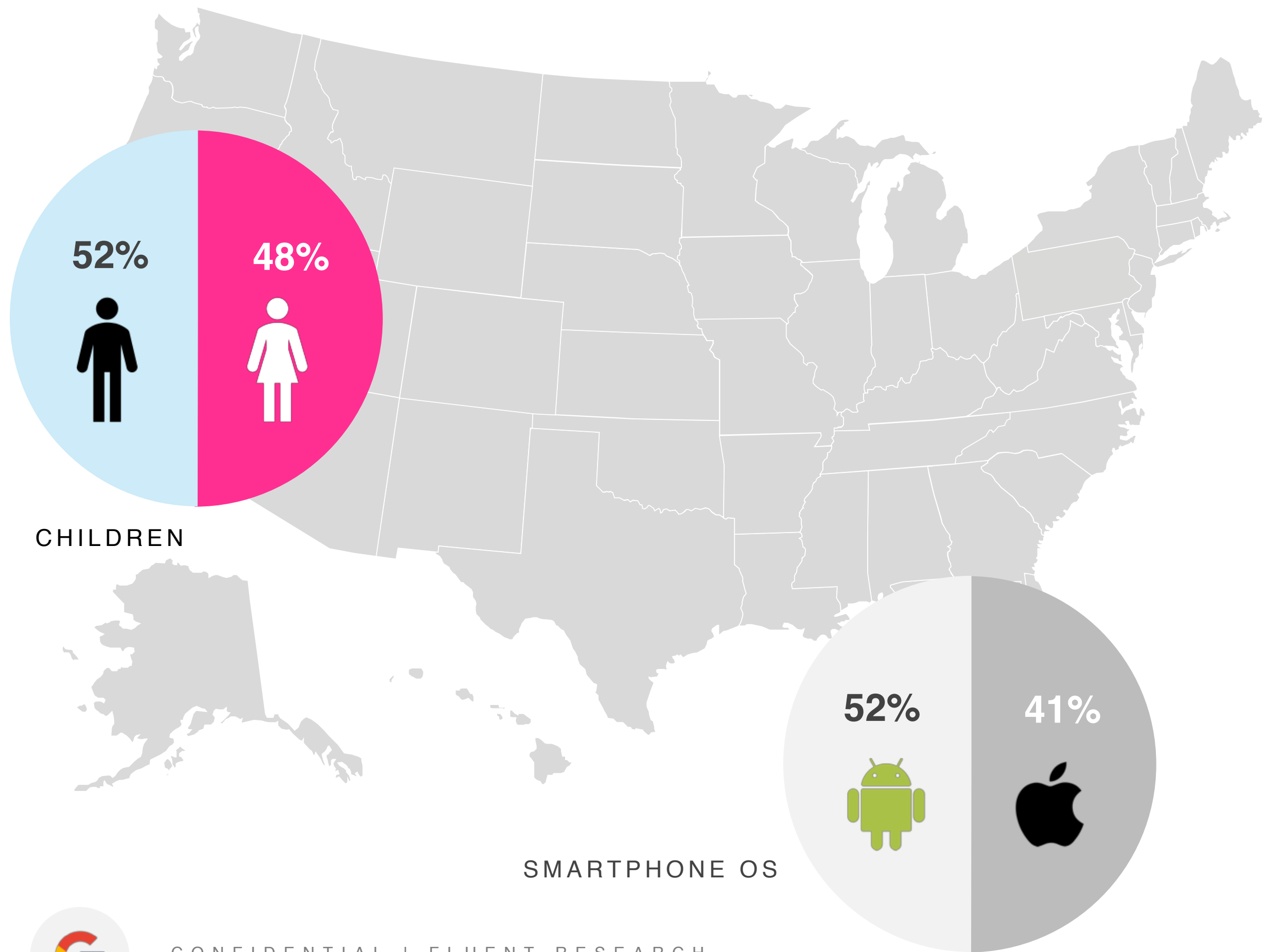
	Total	Strivers	Well-Adapted	Unhappy Campers	Coasters
N	2000	466	227	484	819
Size of segment	NA	23%	11%	24%	41%
Age of Parent: <40 years	55%	66%	51%	54%	50%
Age of Parent: 40+ years	45%	34%	48%	46%	49%
Gender of Parent: Male	27%	37%	32%	26%	21%
Gender of Parent: Female	73%	63%	68%	74%	79%
Age of Child: 2 – 5 years	25%	23%	23%	22%	28%
Age of Child: 6 – 12 years	25%	33%	23%	23%	22%
Age of Child: 13 – 18 years	50%	44%	54%	54%	50%
Gender of Child: Male	52%	53%	54%	53%	49%
Gender of Child: Female	48%	47%	46%	47%	51%
Total Number of Children in HH: One	41%	41%	41%	43%	39%
Total Number of Children in HH: Two ore more	60%	58%	59%	57%	61%
Marital Status: Married/Living with Partner	74%	79%	69%	75%	72%
Marital Status: Other	26%	22%	31%	25%	27%
Parent Education: College degree or more	39%	51%	33%	39%	35%
Urban	38%	49%	46%	32%	32%
Suburban/Rural	62%	51%	53%	67%	67%
Smartphone OS: Android	52%	44%	55%	49%	56%
Smartphone OS: iOS	41%	51%	41%	41%	35%
Race/Ethnicity: Hispanic	27%	29%	35%	23%	26%
Race/Ethnicity: White	39%	38%	26%	43%	40%
Race/Ethnicity: Black/ African-American	19%	16%	29%	15%	19%
Race/Ethnicity: Asian	11%	13%	7%	13%	9%
Region: Northeast	18%	20%	18%	17%	16%
Region: Midwest	19%	15%	21%	20%	20%
Region: South	42%	41%	41%	42%	44%
Region: West	21%	23%	20%	22%	20%

OVERVIEW

Families in the US align closely with the global average on a number of general wellbeing scores and technology-related attitudes and behaviors. The US sample represents families across spectrum of digital technology usage, and their technology benefits ratings reflect that diversity. The US sample has a large proportion of Coaster persona: families that are not convinced of the technology benefits and are more immune to technology stress.

TECHNOLOGY OUTLOOK

Technology Benefits	34%	32%	34%
Technology Stress	45%	30%	26%

■ Low ■ Medium ■ High

PERSONAS

- 23% (Strivers)
- 11% (Well-Adapted)
- 24% (Unhappy Campers)
- 41% (Coasters)
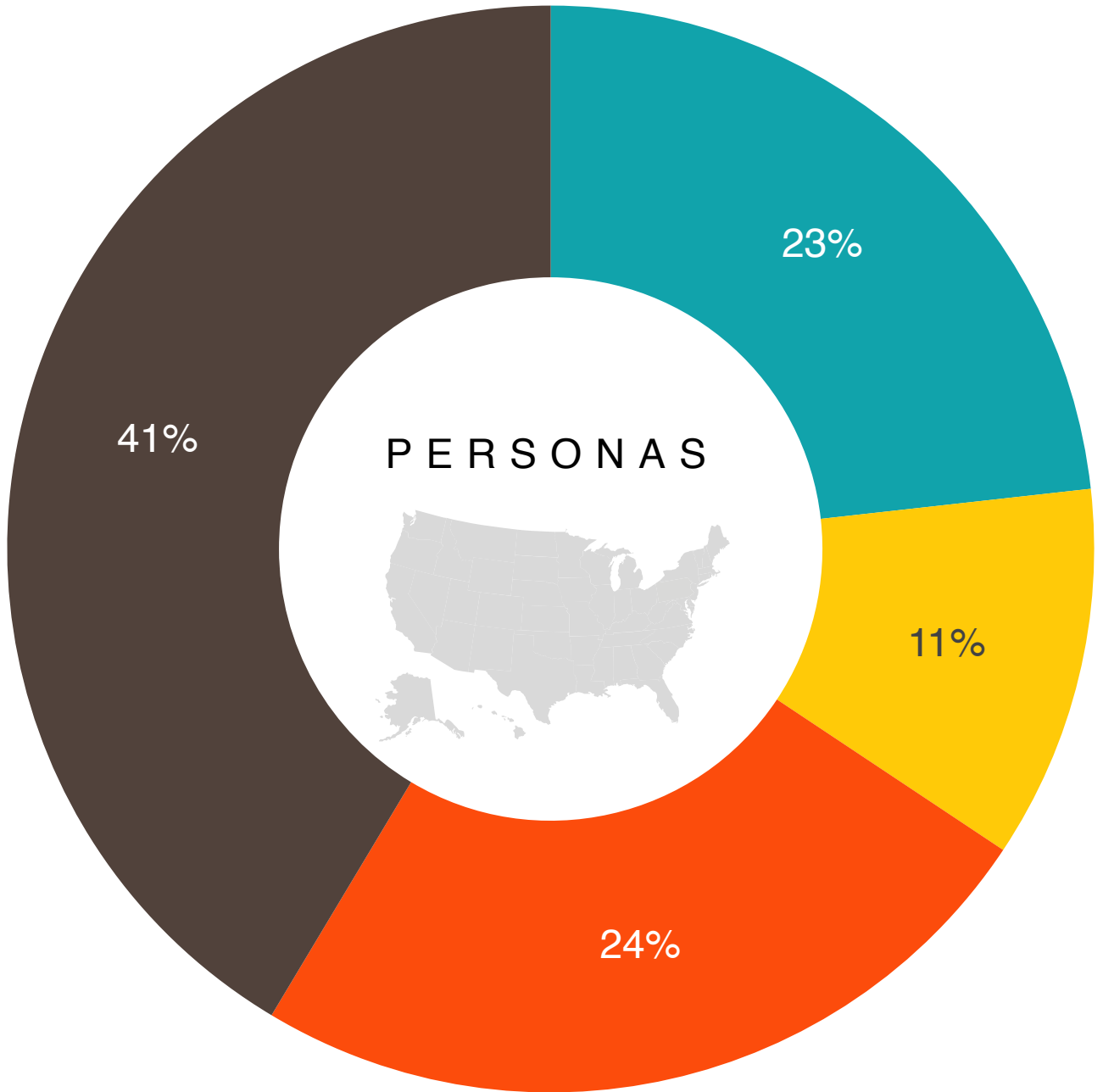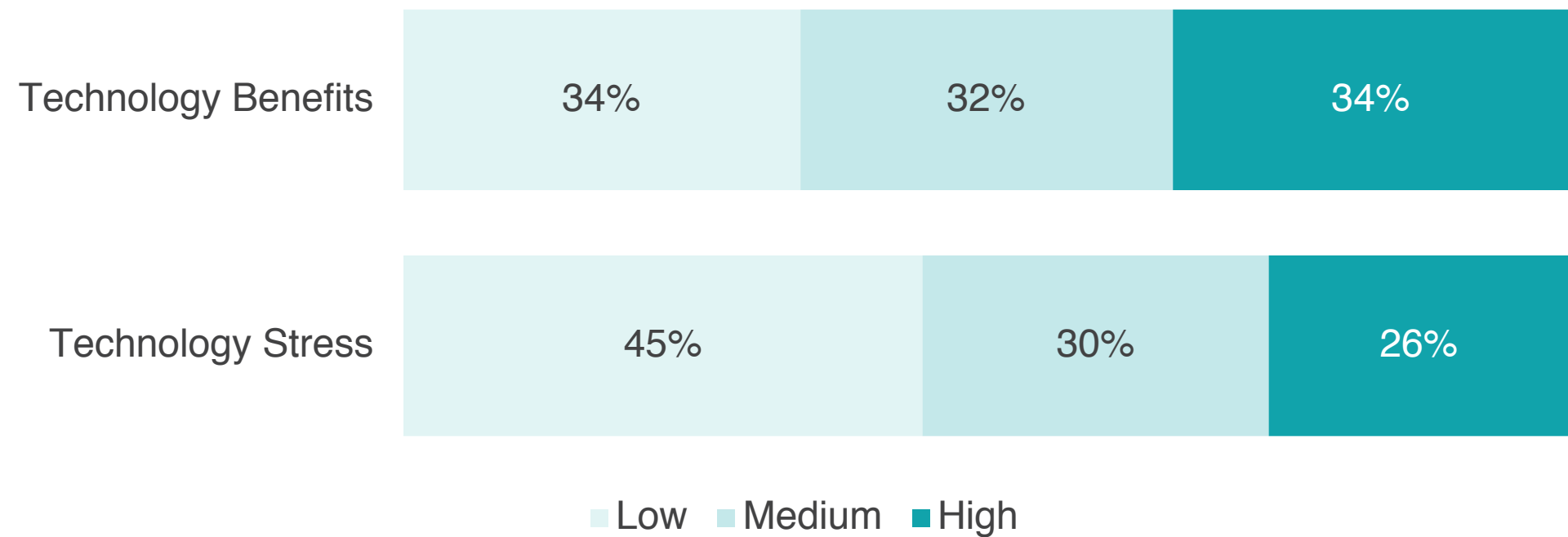
■ Strivers   ■ Well-Adapted   ■ Unhappy Campers   ■ Coasters

Families in the US report moderate levels of satisfaction with their family wellbeing. Slightly more than half of American parents describe their families as happy. One in five American families are stressed-out and always rushed for time, a slightly higher number than the global average.

American families engage in many daily activities with their child, such as helping with homework and spending unplugged time, in line with the global average, However, they are less likely than other families to have dinner at home with their child daily.

American parents report that their child shares what's going on in their lives. Parents in the U.S. are more likely than parents globally to think that children should do what they are told.

While a majority of parents worry about their child's safety, these numbers are close to the global average.

Demographic trends: Family wellbeing is associated with parents' gender and education, household income, and location. Fathers report higher wellbeing and higher stress than mothers. Parents with higher education (college+) and higher income ($75K+) report higher wellbeing scores, as do urban and suburban parents. Asian/Pacific Islander parents score significantly lower on the wellbeing index than parents of other races/ethnicities.

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

GENERAL PROFILE

American parents report average levels of family wellbeing and parental engagement. They are slightly more stressed than the global average.

FAMILY WELLBEING

Family is described completely/very well as happy, 56%◉
Very/extremely satisfied with:
- Being safe, 50%▲
- Spending time with family, 54%◉
- Being role model to child, 54%▲
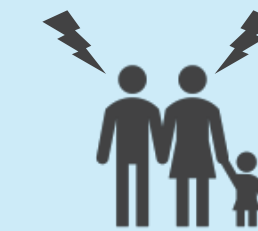
FAMILY STRESS

Family is described completely/very well as:
- Stressed-out, 20%▲
- Always rushed for time, 22%▲
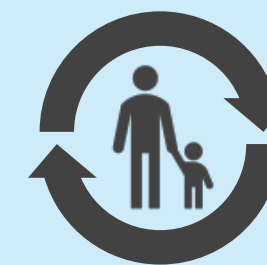
PARENTAL ENGAGEMENT

Do activities with child daily:
- Homework, 32%◉
- Eat dinner, 47%▼
- Spend unplugged time, 29%◉
- Learn and study new things, 28%◉
Child shares what's going on in life, 81%◉
Children should do what they are told, 79%▲

PARENTAL CONCERNS

Optimistic about child's future, 81%◉
Very/extremely concerned about:
- Child's academic performance, 36%◉
- Child's emotional wellbeing, 39%◉
Worry frequently about child's safety, 60%◉

Families in the US have a generally positive perception of digital technology and comparatively little sense of being overwhelmed by it. A majority of US parents say that digital technology has diverse positive developmental effects on their children.

Americans have comparatively low levels of concern about overall safety or wellbeing, and comparatively high levels of optimism.

Safety vs. Danger: Believe digital tech has positive effect on keeping family safe and have used geolocation to keep track of where their child is.

Productivity vs. Waste: Use digital tech for family scheduling, information about child's school and shopping at global average rates. Concerns about distracting properties of digital tech are on par with global averages.

Healthy Development vs. Developmental Harm: Believe digital tech has a positive effect on their child's intellectual development, emotional wellbeing and social life.

Connection vs. Isolation: Believe digital tech has a positive effect on feeling connected as a family and on balancing alone and together time.

Demographic trends: Higher income American families are more likely thank lower-income families to acknowledge benefits of technology to their child's development and their family's wellbeing.

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

TECHNOLOGY PROFILE

Parents in the US believe in digital tech's capacity to have a positive impact on their children's lives. Their reported digital activities and concerns are on par with global averages.

SAFETY

- Digital tech has positive effect on keeping family safe, 63%◉
- Tech helps often to keep child safe, 34%◉
- Use tech to stay in touch with family daily, 48%◉
- Use geolocation to keep track of child, 60%◉
- Worry often about inappropriate content on digital tech, 36%◉

DEVELOPMENT

Digital tech has positive effect on child's:
- Intellectual development, 68%◉
- Social life, 55%◉
- Emotional wellbeing, 52%◉

Tech often helps child:
- Gain knowledge and skills, 49%◉
- Succeed in school, 50%◉
- Become more independent, 37%◉
- Make or strengthen friendships, 30%◉

PRODUCTIVITY

Use of tech is often a productive use of my time, parents: 38%◉, teens: 47%◉
Use of tech is often a productive use of child's time, 32%◉
Use tech weekly:
- For family scheduling (58%◉) and planning events, 34%◉
- To shop online, 60%◉
- For information on child's school, 58% ◉
- To learn new skills, 55%◉
Worry often about child's (31%◉) and own digital addiction, 23%◉
Child wastes time using tech, 30%◉
Child stays up late (25%◉) or skips meals to use tech, 14%◉

CONNECTION

Tech has positive effect on:
- Feeling connected as a family, 62%◉
- Balancing alone and together time, 54%◉
- Spending IRL together, 46%◉
- Stay in touch with extended family, 80%◉
Use tech often to:
- Spend more time together as a family, 29%◉
- Relax and unwind, 46%◉
- Occupy or pacify child (46%◉) or as a reward, 46%◉
Tech is often a source of tension, 20%◉

IN SEARCH OF BALANCE

About half of US families say that they have a good balance when it comes to tech usage and time unplugged; only 14% say they rarely or never achieve this balance – in keeping with global averages.

American parents are very close to global averages in terms of imposition of tech-usage rules for their children and the use of parental control tools.

One in two US parents reports feeling overwhelmed trying to keep up with technology, on par with the global average. While half of American parents express interest in learning more about how to use digital technology to improve their family wellbeing, this level of interest is lower than the global average.

Higher income US families are more likely than lower income families to feel that their family has a good balance in their tech usage. However, higher income parents also report being overwhelmed by the constant change in technology more so than lower income parents. Interest in more information on digital wellbeing is higher among parents with higher education, higher income, and from urban locations.

Less than half of American families report having a good balance between tech and unplugged times. However, they are less interested in seeking more information about how digital tech can help improve their family wellbeing.

BALANCE

Family often has a good balance between tech and unplugged times, 46%◉
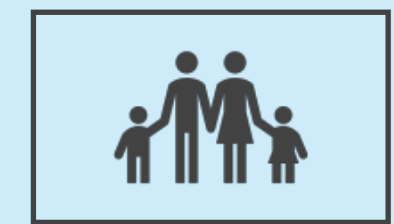
FAMILY RULES

Have rules around digital tech:
- Amount of time child can use tech, 39%◉
- What child can watch, 41%◉
- No devices during dinner, 43%◉
- Use parental control apps to control time on tech (16%◉) or block content, 23%◉
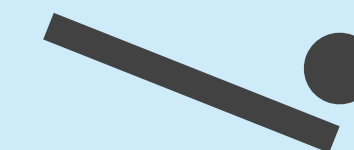
FEELING OVERWHELMED

Feel overwhelmed by constant changes in technology, 52%◉

SEEKING HELP

Interested in information on digital wellbeing, 51%▼

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

DIGITAL WELLBEING OF FAMILIES

BRAZIL

BRAZIL SAMPLE

CHILDREN

52% 48%

SMARTPHONE OS

71% 20%
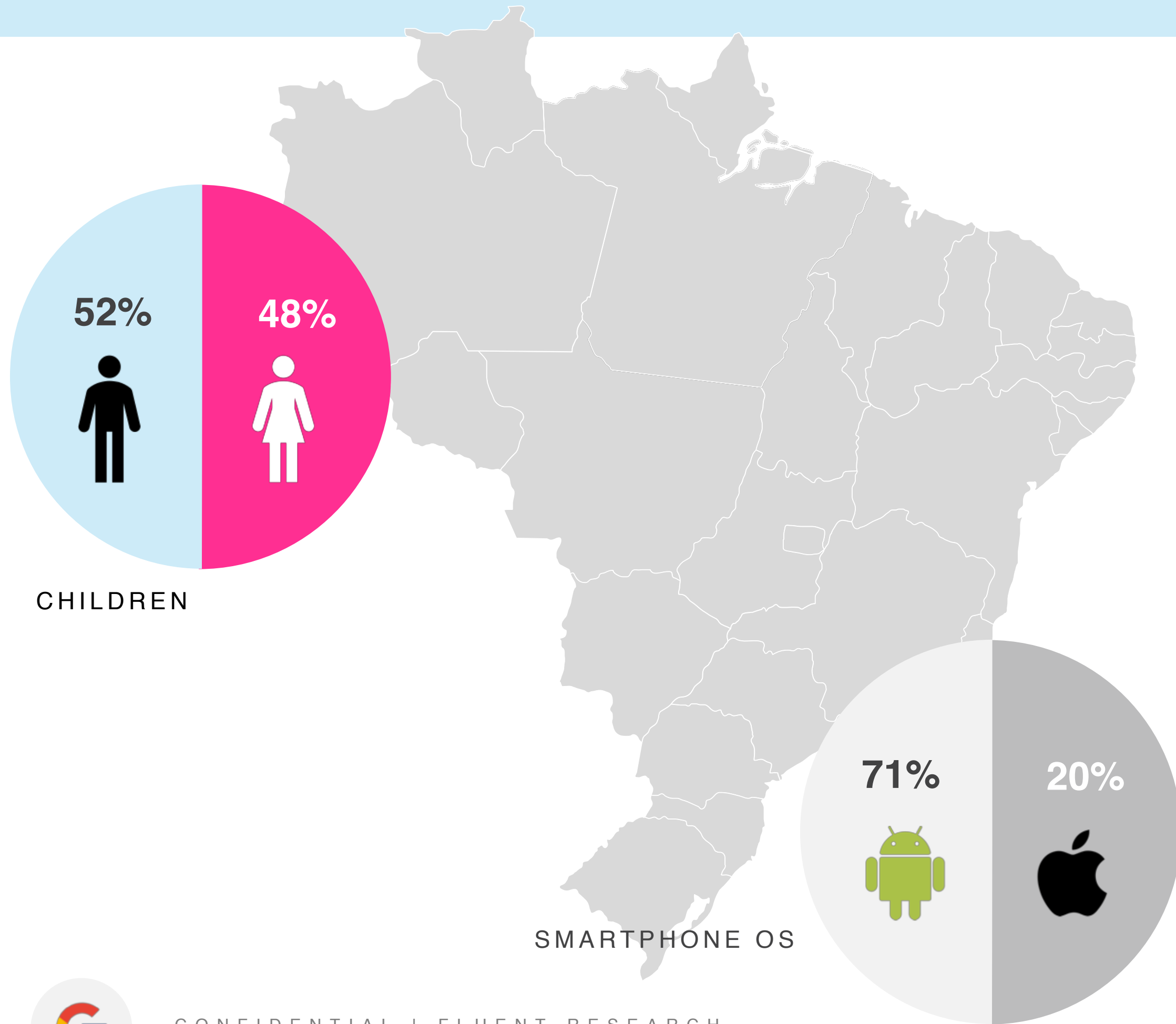
	Total	Strivers	Well-Adapted	Unhappy Campers	Coasters
N	1000	456	124	234	186
Size of segment	NA	46%	12%	23%	19%
Age of Parent: <40 years	54%	55%	57%	50%	51%
Age of Parent: 40+ years	47%	44%	43%	51%	49%
Gender of Parent: Male	44%	45%	38%	47%	42%
Gender of Parent: Female	56%	55%	62%	53%	58%
Age of Child: 2 – 5 years	25%	18%	24%	27%	39%
Age of Child: 6 – 12 years	25%	25%	32%	20%	25%
Age of Child: 13 – 18 years	50%	56%	44%	53%	35%
Gender of Child: Male	52%	55%	55%	49%	47%
Gender of Child: Female	48%	45%	45%	51%	53%
Total Number of Children in HH: One	51%	51%	39%	54%	57%
Total Number of Children in HH: Two ore more	49%	49%	62%	47%	43%
Marital Status: Married/Living with Partner	82%	83%	83%	83%	76%
Marital Status: Other	19%	17%	18%	16%	25%
Parent Education: College degree or more	61%	64%	60%	58%	57%
Urban	92%	93%	92%	89%	94%
Suburban/Rural	8%	6%	8%	11%	6%
Smartphone OS: Android	71%	74%	78%	64%	67%
Smartphone OS: iOS	20%	20%	21%	22%	18%
Region: Southeast	61%	60%	59%	62%	62%
Region: Northeast	18%	19%	21%	15%	16%
Region: South	14%	13%	16%	13%	17%
Region: Other	8%	9%	4%	9%	5%

OVERVIEW

Families in Brazil have the second largest proportion of Strivers, second only to India. Brazilian parents believe in the positive effect of digital technology on their lives, but they also experience tech-related stress. They exhibit average levels of general family wellbeing and lower levels of general family stress than families in other countries.

TECHNOLOGY OUTLOOK

	Low	Medium	High
Technology Benefits	22%	30%	48%
Technology Stress	20%	34%	47%

Legend: ■ Low ■ Medium ■ High

PERSONAS

- 46% Strivers
- 12% Well-Adapted
- 23% Unhappy Campers
- 19% Coasters
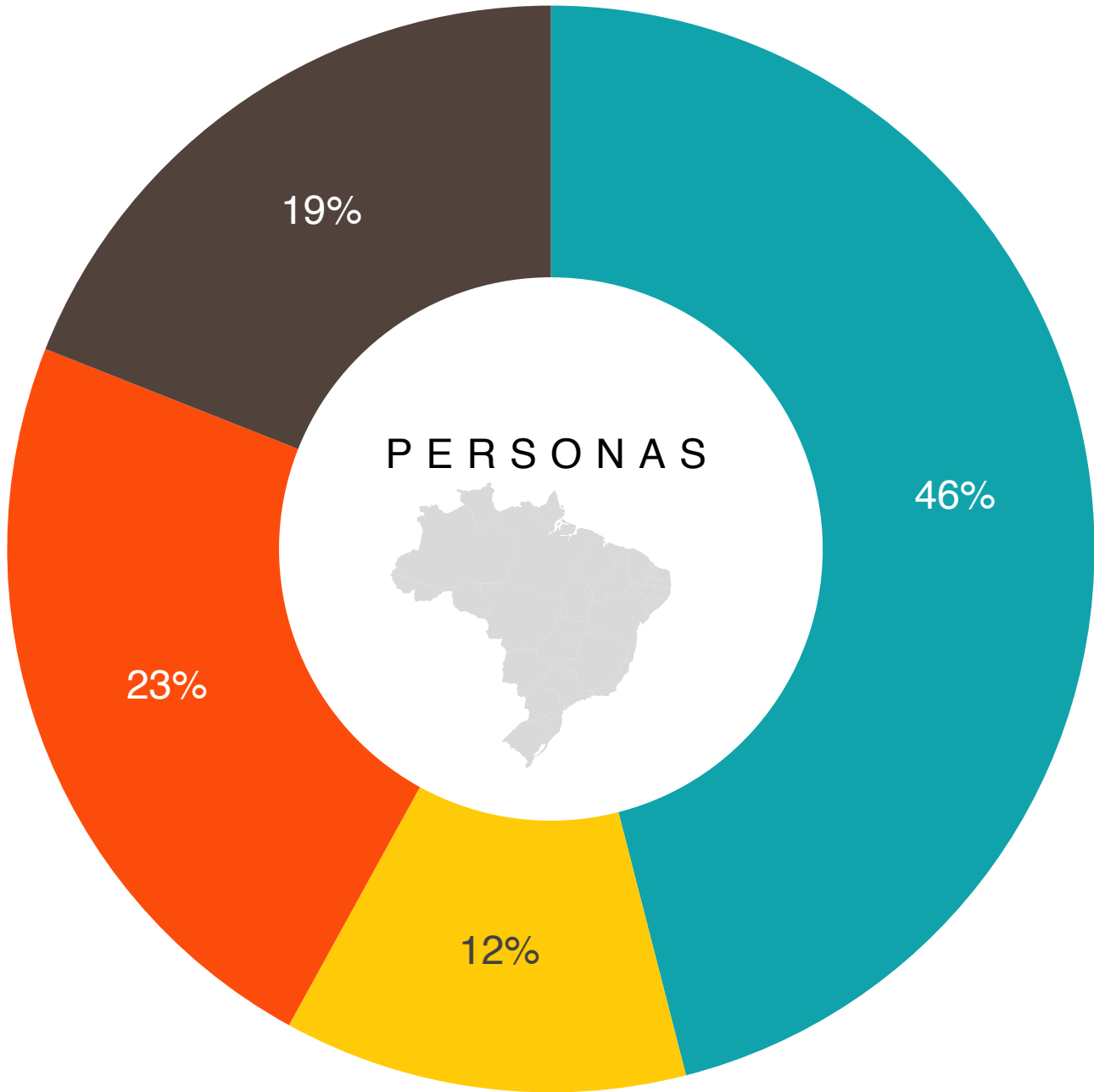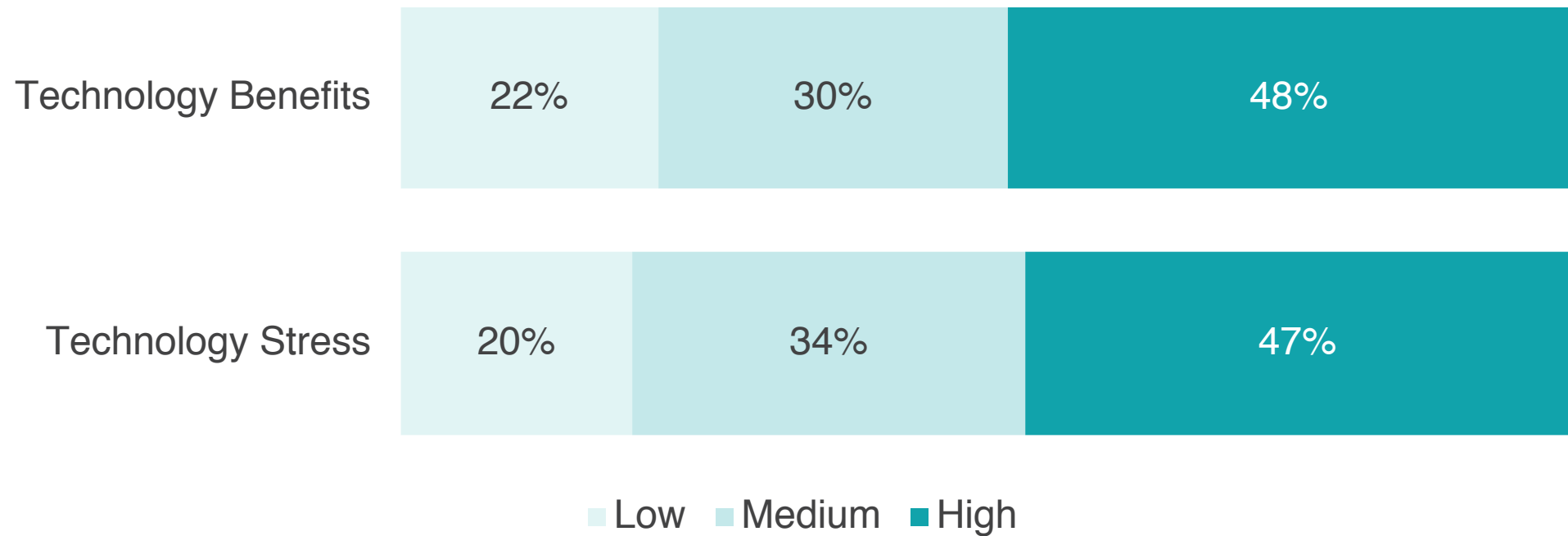
Legend: ■ Strivers ■ Well-Adapted ■ Unhappy Campers ■ Coasters

Families in Brazil report average levels of family wellbeing: about half of Brazilian parents describe their families as happy. Only a minority of Brazilian parents describe their family as stressed-out. Yet, they express the highest levels of worry and concern about their child's safety and wellbeing, and their family's financial situation. Despite their high levels of worry, Brazilian parents display the highest levels of optimism about their child's future.

Brazilian parents engage in a variety of daily activities with their children, such as eating dinner at home and doing homework, at the average global rates. What sets them apart is their parenting style: Brazilian parents are the most likely of all parents to stress the importance of strict rules and boundaries for their child, and they are less likely than others to agree that children should be allowed to make their own decisions.

Demographic trends: Family wellbeing is associated with income and education: higher income and higher-educated Brazilian parents score higher on the wellbeing index. Urban residents also demonstrate higher wellbeing than rural/small town residents.

GENERAL PROFILE

Brazilian parents express high levels of concern for their child's safety and wellbeing; yet, they are the most optimistic about their child's future.

FAMILY WELLBEING

Family is described completely/very well as happy, 53% ◉
Very/extremely satisfied with:
- Being safe, 31% ◉
- Being financially secure, 29% ◉
- Spending time with family, 45% ◉
- Being role model to child, 53% ▲

FAMILY STRESS

Family is described completely/very well as:
- Stressed-out, 11% ▼
- Always rushed for time, 15% ◉
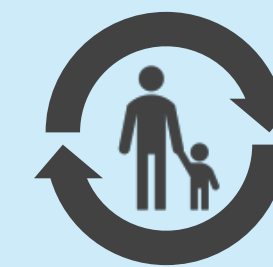
PARENTAL ENGAGEMENT

Do activities with child daily:
- Homework, 41% ◉
- Eat dinner, 58% ◉
- Spend unplugged time, 36% ◉
- Learn and study new things, 34% ▲
- Listen to music, 41% ▲
Child shares what's going on in life, 84% ◉
It's important that child has strict rules, 87% ▲
Children should be allowed to make their own decisions, 36% ▼
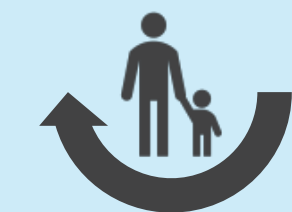
PARENTAL CONCERNS

Optimistic about child's future, 91% ◉
Very/extremely concerned about:
- Child's academic performance, 43% ◉
- Child's emotional wellbeing, 51% ▲
Frequently worry about:
- Child's safety, 94% ▲
- Child's wellbeing, 94% ▲
- Family's financial situation, 85% ▲

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

TECHNOLOGY PROFILE

Parents in Brazil believe in digital tech's capacity to have a positive impact on their children's lives, but they are also concerned about the addictive properties of digital tech.

Parents in the Brazil have a generally very positive perception of digital technology: a large majority of parents say that digital technology has diverse positive developmental effects on their children. Safety is a major concern for Brazilian parents, and the ability to use technology to keep track of their children seems particularly valuable to them. Brazilian parents use digital tech to meet a range of family needs and believe in the positive impact that digital tech contribute to these areas, including their child's intellectual development, emotional wellbeing and social life. They also believe digital tech has a positive effect on helping families balance alone and together time. However, they express the highest levels of concern about their own and their child's addiction to tech, and they are more likely than others to report having frequent arguments with their child about the use of tech.

Safety vs. Danger: Believe it's important to use tech to keep track of child's location.

Productivity vs. Waste: Believe that use of tech is a productive use of their time; yet worry about their own and their child's addiction to tech.

Healthy Development vs. Developmental Harm: Believe digital tech has a positive effect on their child's intellectual development, emotional wellbeing and social life.

Connection vs. Isolation: Believe digital tech has a positive effect on feeling connected as a family.

.

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

SAFETY

- Digital tech has positive effect on keeping family safe, 67%◉
- Tech helps often to keep child safe, 37%◉
- Use tech to stay in touch with family daily, 63%◉
- Use geolocation to keep track of child, 63%◉
- It's important to use tech to keep track of child, 73%▲
- Worry often about inappropriate content on digital tech, 62%▲

DEVELOPMENT

Digital tech has positive effect on child's:
- Intellectual development, 79%◉
- Social life, 67%◉
- Emotional wellbeing, 74%▲
Tech often helps child:
- Gain knowledge and skill, 63%◉
- Succeed in school, 53%◉
- Become more independent, 53%▲
- Make or strengthen friendships, 42%◉

PRODUCTIVITY

Use of tech is often a productive use of my time, parents: 55%▲, teens: 56%◉
Use of tech is often a productive use of child's time, 40%◉
Use tech weekly:
- For family scheduling (53%) and planning events, 39%◉
- To shop online, 46%◉
- For information on child's school, 63%◉
- To learn new skills, 63%◉
Worry often about child's (55%▲) and own digital addiction, 42%▲
Child wastes time using tech, 40%▲
Child stays up late (30%▲) or skips meals to use tech, 17%◉

CONNECTION

Tech has positive effect on:
- Feeling connected as a family, 75%◉
- Balancing alone and together time, 69%▲
- Spending IRL together, 60%◉
- Staying in touch with extended family, 87%◉
Use tech often to:
- Spend more time together as a family, 33%◉
- Relax and unwind, 55%▲
- Occupy or pacify child (56%◉) or as a reward, 38%◉
Have arguments with child often about use of tech, 31%▲

IN SEARCH OF BALANCE

One in two Brazilian families report having a good balance between connected and disconnected times. This is despite the fact that a significant number of Brazilian parents are worried that they and their children are becoming addicted to digital technology.

Another contradiction is the fact that despite their high emphasis on the importance of strict rules for children, the majority of Brazilian parents do not enforce them when it comes to their child's tech usage, such as monitoring the amount of time their child spends on tech or the content they are exposed to. The majority does have a rule of no devices during dinner, in line with the global average.

One in two Brazilian parents report being overwhelmed by constant changes and developments in technology. A much larger majority is interested in information on how to use digital technology to improve their wellbing.

Brazilian families experience average levels of balance between tech and unplugged times, but three-quarters are interested in information on digital wellbeing.

BALANCE

Family often has a good balance between tech and unplugged times, 51%◎
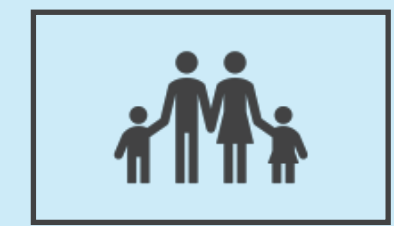
FAMILY RULES

Have rules around digital tech:
- Amount of time child can use tech, 40%◎
- What child can watch, 45%◎
- No devices during dinner, 54%◎
- Use parental control apps to control time on tech (16%◎) or block content, 27%◎
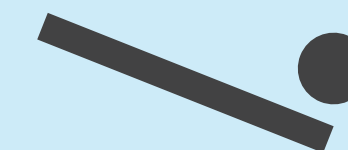
FEELING OVERWHELMED

Feel overwhelmed by constant changes in technology, 51%◎

SEEKING HELP

Interested in information on digital wellbeing, 74%◎

▲ Over-index (>120) compared to global average
◎ Global average
▼ Under-index (<80) compared to global average

DIGITAL WELLBEING OF FAMILIES

MEXICO

DIGITAL WELLBEING OF FAMILIES

MEXICO SAMPLE

CHILDREN

50% 50%

SMARTPHONE OS

65% 28%
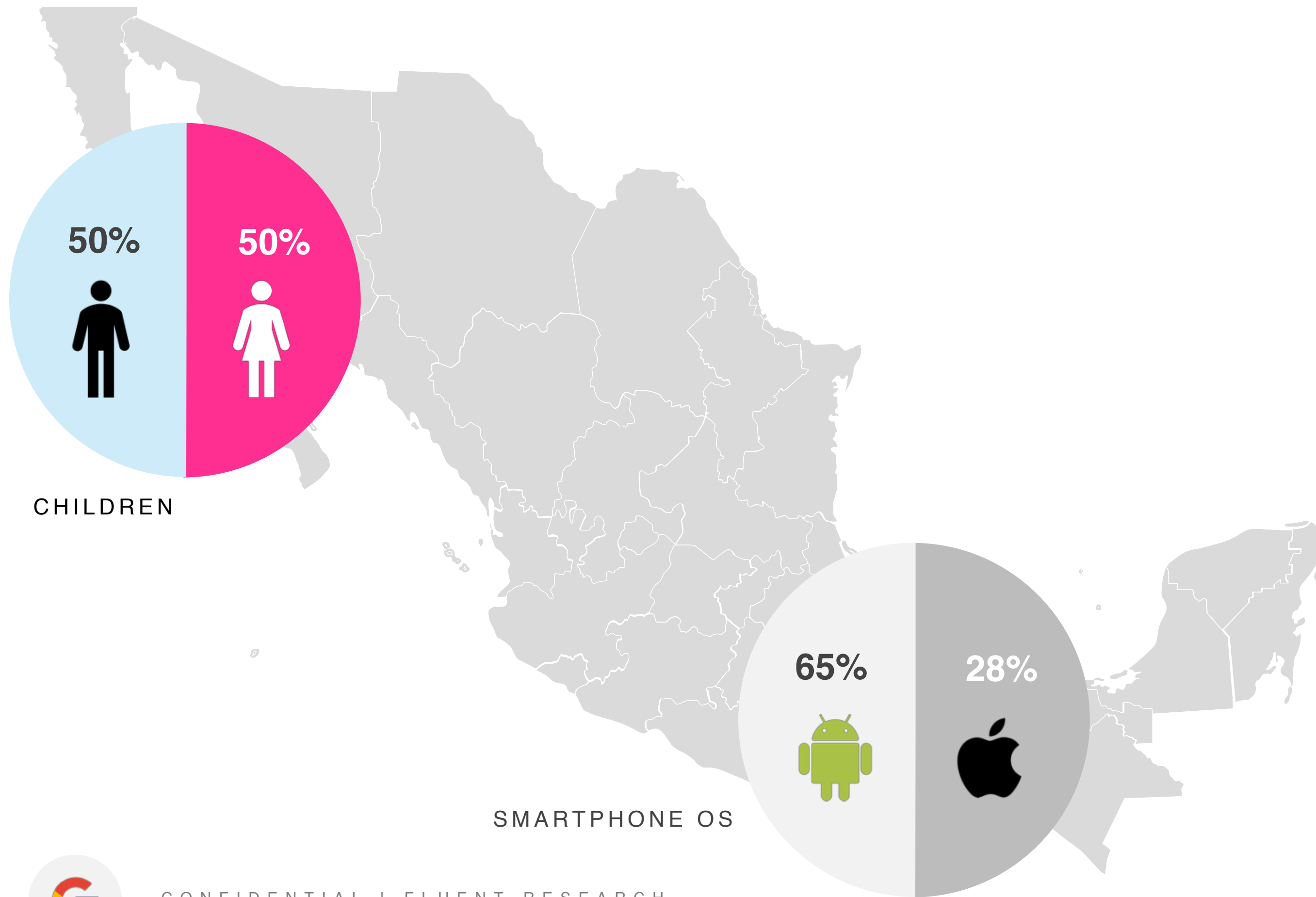
	Total	Strivers	Well-Adapted	Unhappy Campers	Coasters
N	1039	258	179	219	383
Size of segment	NA	25%	17%	21%	37%
Age of Parent: <40 years	60%	65%	51%	65%	59%
Age of Parent: 40+ years	40%	35%	50%	35%	40%
Gender of Parent: Male	47%	47%	51%	49%	43%
Gender of Parent: Female	53%	53%	49%	51%	57%
Age of Child: 2 – 5 years	25%	19%	20%	29%	29%
Age of Child: 6 – 12 years	26%	28%	26%	22%	26%
Age of Child: 13 – 18 years	49%	53%	55%	49%	44%
Gender of Child: Male	50%	49%	55%	53%	47%
Gender of Child: Female	50%	51%	45%	47%	53%
Total Number of Children in HH: One	36%	30%	34%	32%	42%
Total Number of Children in HH: Two ore more	64%	70%	67%	68%	58%
Marital Status: Married/Living with Partner	84%	83%	86%	84%	84%
Marital Status: Other	17%	18%	14%	16%	17%
Parent Education: College degree or more	73%	73%	80%	73%	68%
Urban	91%	94%	94%	87%	89%
Suburban/Rural	10%	6%	5%	13%	12%
Smartphone OS: Android	65%	66%	63%	64%	67%
Smartphone OS: iOS	28%	30%	33%	29%	25%
Region: Ciudad de México	24%	27%	23%	26%	22%
Region: Mexico	12%	9%	16%	10%	15%
Region: Jalisco	10%	11%	9%	10%	10%
Region: Other	53%	53%	52%	55%	53%

OVERVIEW

Mexican families are characterized by relatively high general wellbeing and low-to-moderate family stress levels. This is reflected in the distribution of personas, with sizeable Strivers and Well-Adapted segments. Mexican families appreciate the benefits of digital technology and they experience less technology-related stress than many other countries.

TECHNOLOGY OUTLOOK

	Low	Medium	High
Technology Benefits	27%	33%	40%
Technology Stress	44%	32%	24%

Legend: Low | Medium | High

PERSONAS

- Strivers 25%
- Well-Adapted 17%
- Unhappy Campers 21%
- Coasters 37%
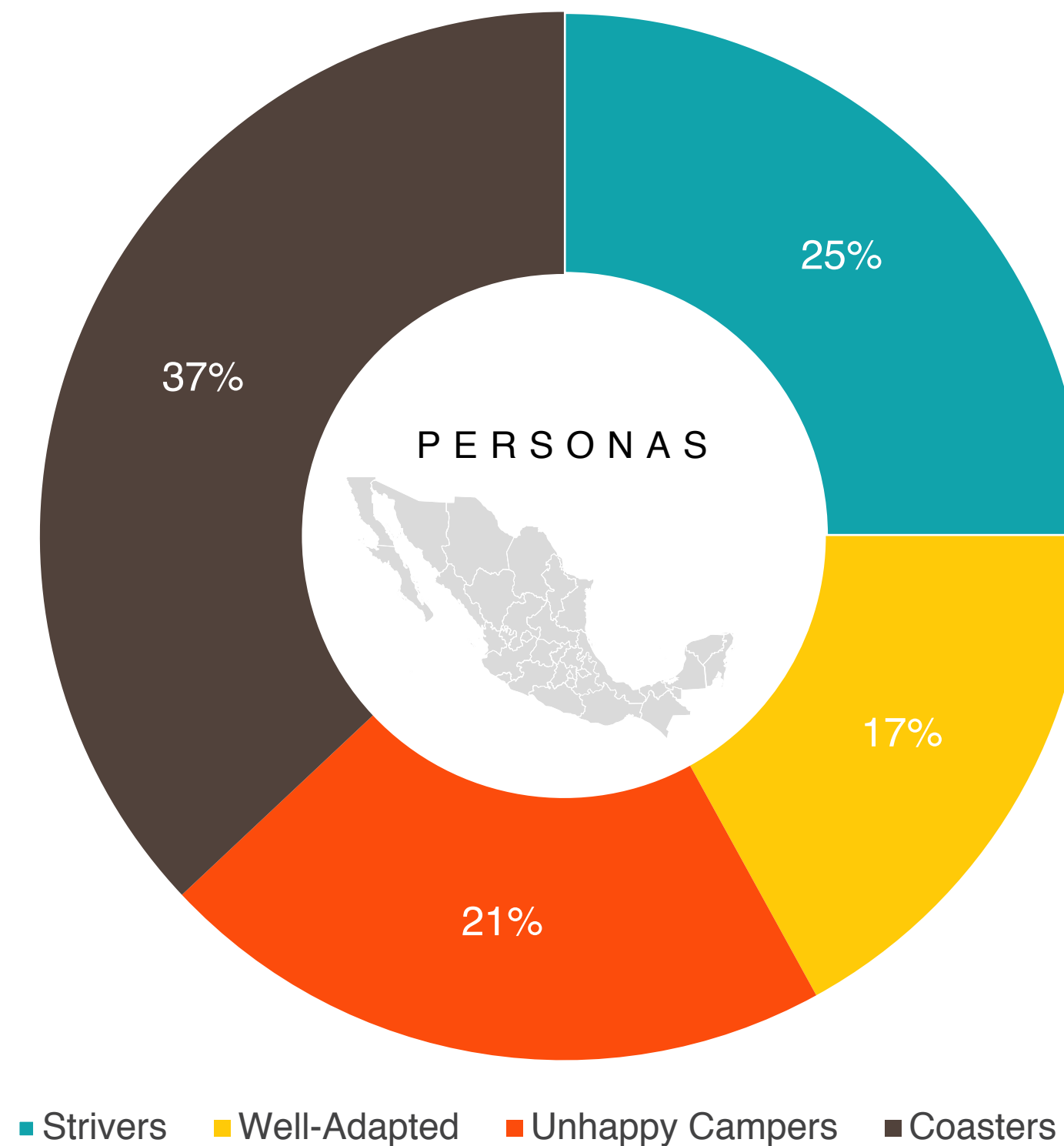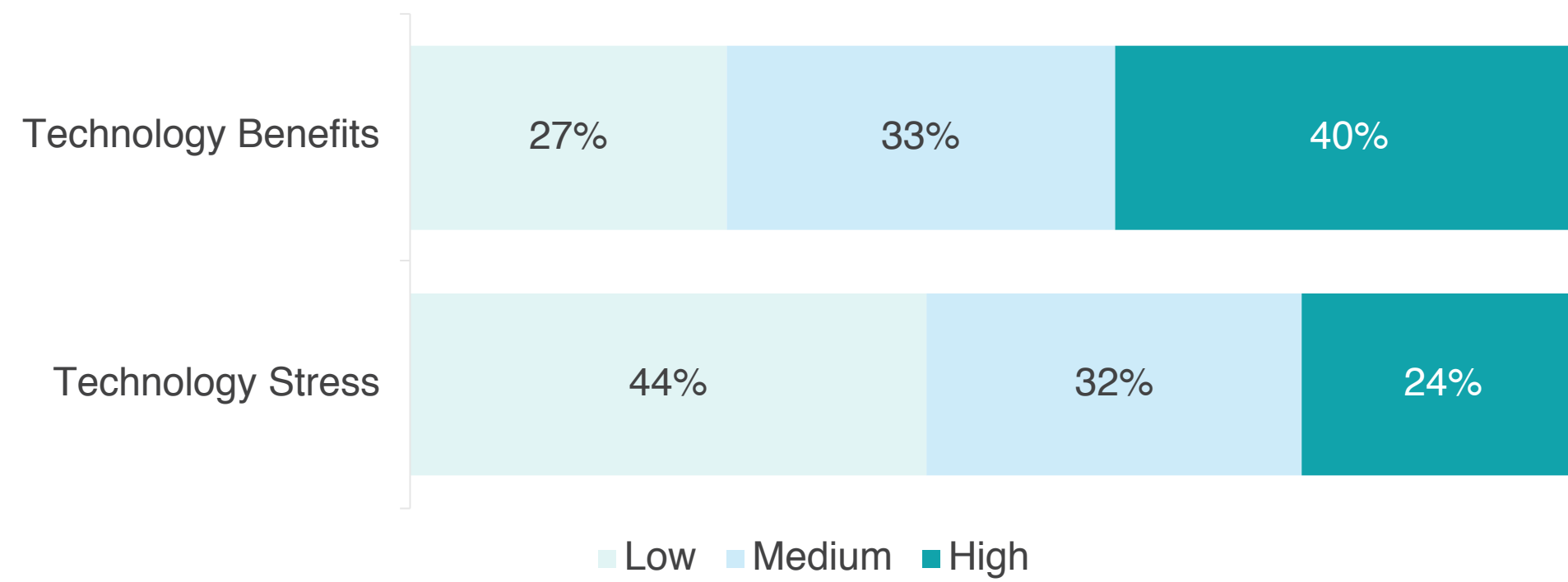
Mexican families exhibit high wellbeing scores. They are the most likely to describe their families as happy (along with India) and close-knit. They are very unlikely to describe their families as stressed-out or isolated from each other; however, they describe their families as always rushed for time.

Parents in Mexico engage in daily activities with their child, such as eating dinner and helping with homework, similar to the global average for these activities. Mexican parents tend to have authoritarian style of parenting, with the vast majority insisting on the need to have strict rules and boundaries for their child. However, they also have solid communications with their child, with nearly nine in ten reporting that their child shares what's going on in her life.

Mexican parents report high levels of optimism about their child's future, but they also express concern about their child's academic performance, emotional wellbeing, and safety.

Demographic trends: Family wellbeing is associated with income, education and urbanicity: higher income, more educated, and urban/suburban Mexican families demonstrate higher family wellbeing than lower income, lower educated, and rural Mexican families.

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average≈

GENERAL PROFILE

Mexican families exhibit high levels of family wellbeing and low levels of family stress. Mexican parents are optimistic about their child's future but are worried about their child's safety, academic success and emotional wellbeing.
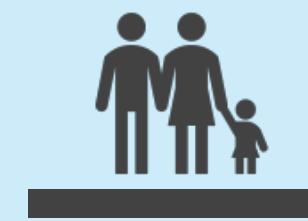
FAMILY WELLBEING

Family is described completely/very well as:
- Happy, 65%▲
- Close-knit, 69%▲

Very/extremely satisfied with:
- Being safe, 47%▲
- Being financially secure, 36%▲
- Spending time with family, 57%▲
- Being role model to child, 52%▲

FAMILY STRESS

Family is described completely/very well as:
- Stressed-out, 9%▼
- Always rushed for time, 21%▲
- Isolated or disconnected from each other, 7%▼
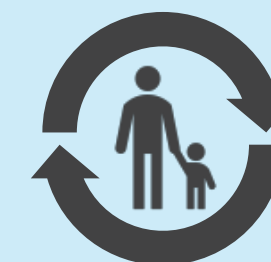
PARENTAL ENGAGEMENT

Do activities with child daily:
- Homework, 43%◉
- Eat dinner, 70%◉
- Spend unplugged time, 27%◉

Child shares what's going on in life, 87%◉
Children should do what they are told, 78%▲
It's important for my child to have strict rules, 89%▲
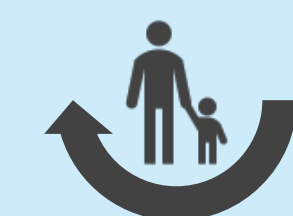
PARENTAL CONCERNS

Optimistic about child's future, 90%◉
Very/extremely concerned about:
- Child's academic performance, 55%▲
- Child's emotional wellbeing, 68%▲

Frequently worry about child's safety, 87%▲

The majority of Mexican families believe that digital technology has a positive effect on their families' safety, productivity, connection and child's development.

Safety vs. Danger: Mexican parents are highly worried about safety of their children, and they use digital tech to keep tabs on their children.

Productivity vs. Waste: Mexican parents are more likely than parents from other countries to believe that tech is a productive use of their child's time. They also use tech for a variety of family tasks.

Healthy Development vs. Developmental Harm: More likely to believe that tech helps their child succeed in school.

Connection vs. Isolation: The majority of Mexican parents believe that technology has a positive effect on bringing their families together.

Demographic trends: Higher income Mexican families report higher tech benefits than lower income Mexican families.

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

TECHNOLOGY PROFILE

Mexican parents overall observe positive effects of digital technology on their lives, and they use technology to keep their children safe, one of their major concerns.

SAFETY

- Digital tech has positive effect on keeping family safe, 71%◉
- Tech helps often to keep child safe, 34%◉
- Use tech to stay in touch with family daily, 62%◉
- Use geolocation to keep track of child, 71%◉
- Worry often about inappropriate content on digital tech, 58%▲

DEVELOPMENT

Digital tech has positive effect on child's:
- Intellectual development, 78%◉
- Social life, 60%◉
- Emotional wellbeing, 60%◉

Tech often helps child:
- Gain knowledge and skills, 61%◉
- Succeed in school, 63%▲
- Become more independent, 40%◉
- Make or strengthen friendships, 34%◉

PRODUCTIVITY

Use of tech is often a productive use of my time, parents: 51%◉, teens: 58%◉
Use of tech is often a productive use of child's time, 42%▲
Use tech weekly:
- For family scheduling (50%◉) and planning events, 35%◉
- To shop online, 46%◉
- For information on child's school, 62%◉
- To learn new skills, 61%◉
Worry often about child's (33%◉) and own digital addiction, 28%◉
Child often wastes time using tech, 21%▼
Child often stays up late (21%◉) or skips meals to use tech, 11%▼

CONNECTION

Tech has positive effect on:
- Feeling connected as a family, 67%◉
- Balancing alone and together time, 60%◉
- Spending IRL together, 55%◉
- Trying new activities to do together, 74%◉
- Staying in touch with extended family, 86%◉
Use tech often to:
- Spend more time together as a family, 29%◉
- Relax and unwind, 39%◉
- Occupy or pacify child (46%◉) or as a reward, 50%◉
Tech is often a source of tension, 15%▼

The majority of Mexican families feel that they have a good balance between tech and unplugged times. They seem to achieve it by using a combination of family rules (e.g., they are the most likely to enforce the no devices during dinner rule) and parental control apps.

Mexican parents are less likely than parents in other countries to feel overwhelmed by constant changes and developments in digital technology. Nevertheless, most want to learn more about how digital technology can help improve their family's wellbeing.

IN SEARCH OF BALANCE

Mexican families have a good balance between connected and disconnected times. However, they are highly interested in information on digital wellbeing.

BALANCE

Family often has a good balance between tech and unplugged times, 55%◉
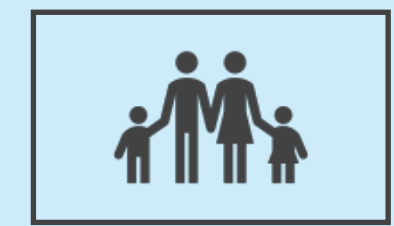
FAMILY RULES

Have rules around digital tech:
- Amount of time child can use tech, 46%◉
- What child can watch, 46%◉
- No devices during dinner, 61%▲
- Use parental control apps to control time on tech (16%◉) or block content, 28%◉
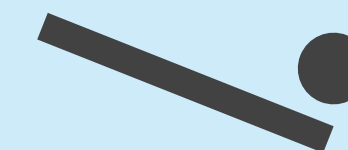
FEELING OVERWHELMED
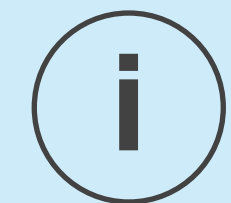
Feel overwhelmed by constant changes in technology, 42%▼

SEEKING HELP

Interested in information on digital wellbeing, 74% ◉

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

DIGITAL WELLBEING OF FAMILIES

GERMANY

DIGITAL WELLBEING OF FAMILIES

GERMANY SAMPLE

CHILDREN

50% 50%

SMARTPHONE OS

64% 26%
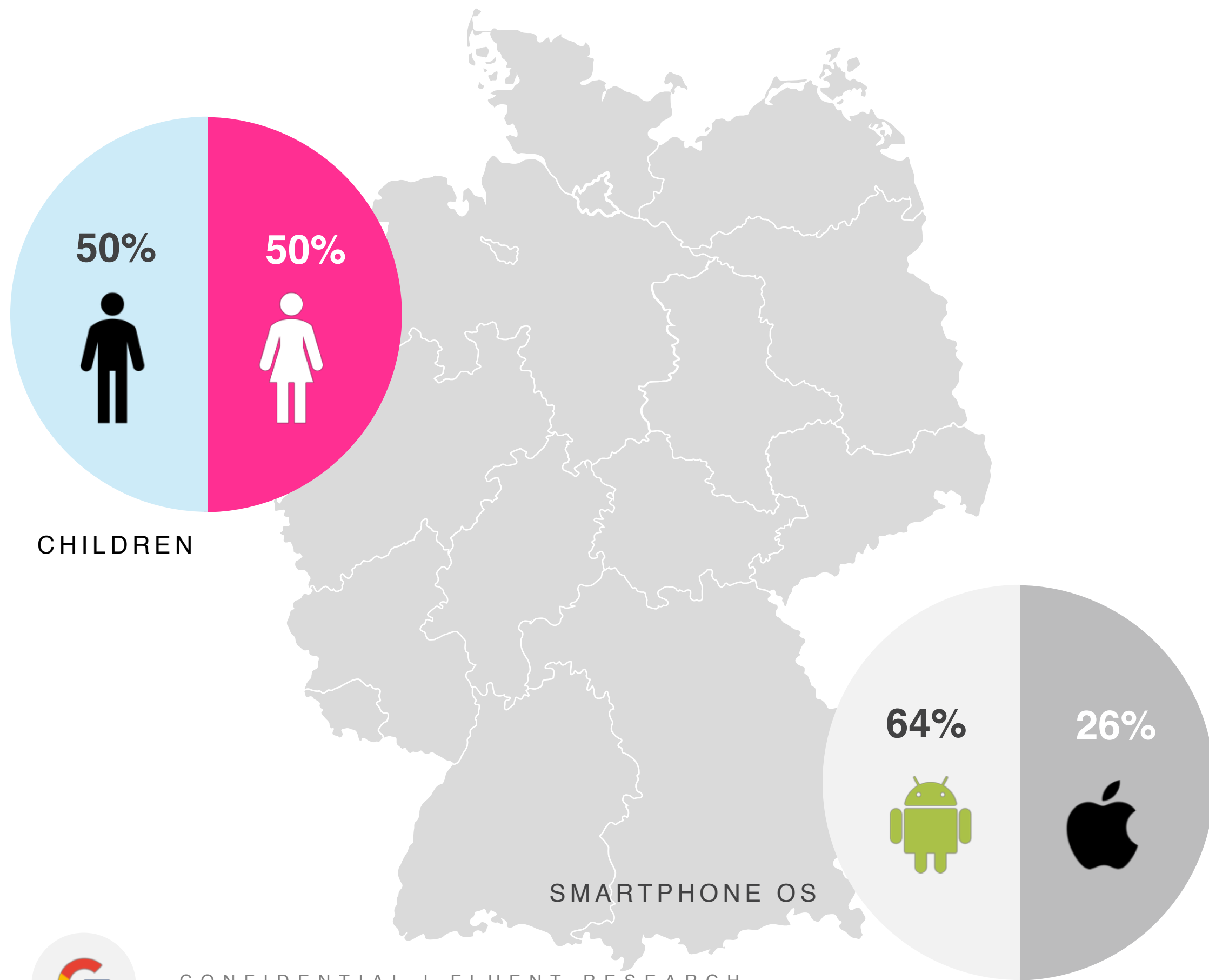
	Total	Strivers	Well-Adapted	Unhappy Campers	Coasters
N	1023	145	43	327	505
Size of segment	NA	14%	4%	32%	50%
Age of Parent: <40 years	45%	55%	47%	46%	43%
Age of Parent: 40+ years	55%	45%	53%	54%	57%
Gender of Parent: Male	46%	57%	60%	51%	38%
Gender of Parent: Female	54%	43%	40%	49%	62%
Age of Child: 2 – 5 years	25%	18%	33%	20%	29%
Age of Child: 6 – 12 years	25%	32%	21%	26%	23%
Age of Child: 13 – 18 years	50%	50%	47%	54%	48%
Gender of Child: Male	50%	48%	40%	53%	50%
Gender of Child: Female	50%	52%	60%	47%	50%
Total Number of Children in HH: One	53%	50%	58%	52%	54%
Total Number of Children in HH: Two ore more	46%	51%	42%	48%	47%
Marital Status: Married/Living with Partner	80%	86%	72%	78%	80%
Marital Status: Other	20%	14%	28%	22%	20%
Parent Education: College degree or more	25%	34%	26%	27%	21%
Urban	46%	59%	58%	49%	40%
Suburban/Rural	53%	41%	42%	51%	60%
Smartphone OS: Android	64%	58%	69%	63%	66%
Smartphone OS: iOS	26%	39%	29%	28%	22%
Region: North-Rhine Westphalia	22%	20%	33%	21%	22%
Region: Bavaria	14%	14%	9%	14%	14%
Region: Baden-Württemberg	11%	10%	14%	11%	10%
Region: Other	54%	55%	44%	53%	54%

OVERVIEW

German families are characterized by their relative indifference to digital technology: they are among the least likely to acknowledge the benefits of digital technology to their child's development or their family's wellbeing. They are also among the least likely to feel technology-related stress. This dynamic is evident in the distribution of personas in Germany, with Well-Adapted in a tiny minority (only 4%, comparable to Japan, Korea and Russia) and the majority, 50%, Coasters.

TECHNOLOGY OUTLOOK

	Low	Medium	High
Technology Benefits	59%	25%	17%
Technology Stress	50%	29%	21%

Low Medium High

PERSONAS

14%
4%
50%
32%
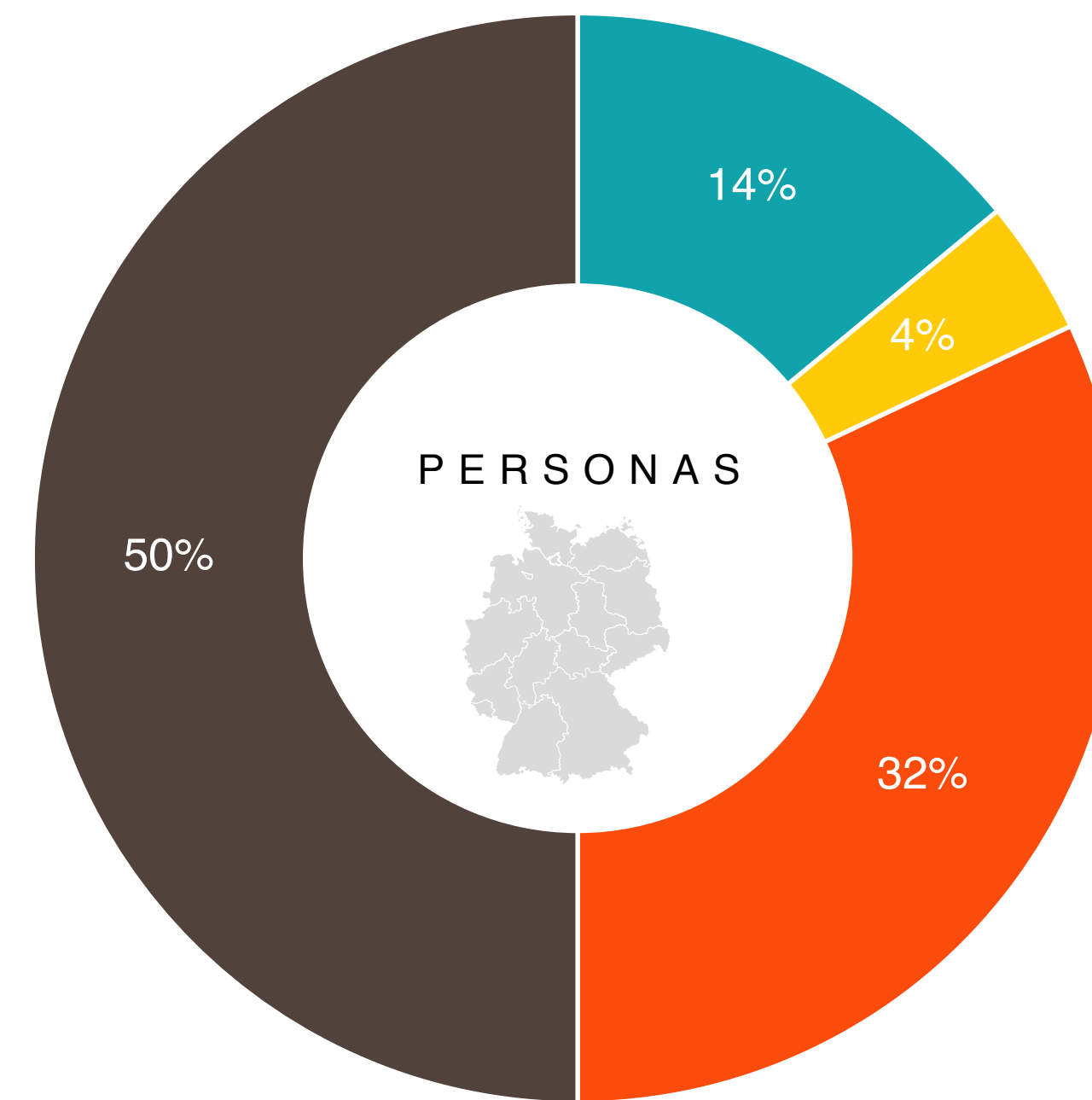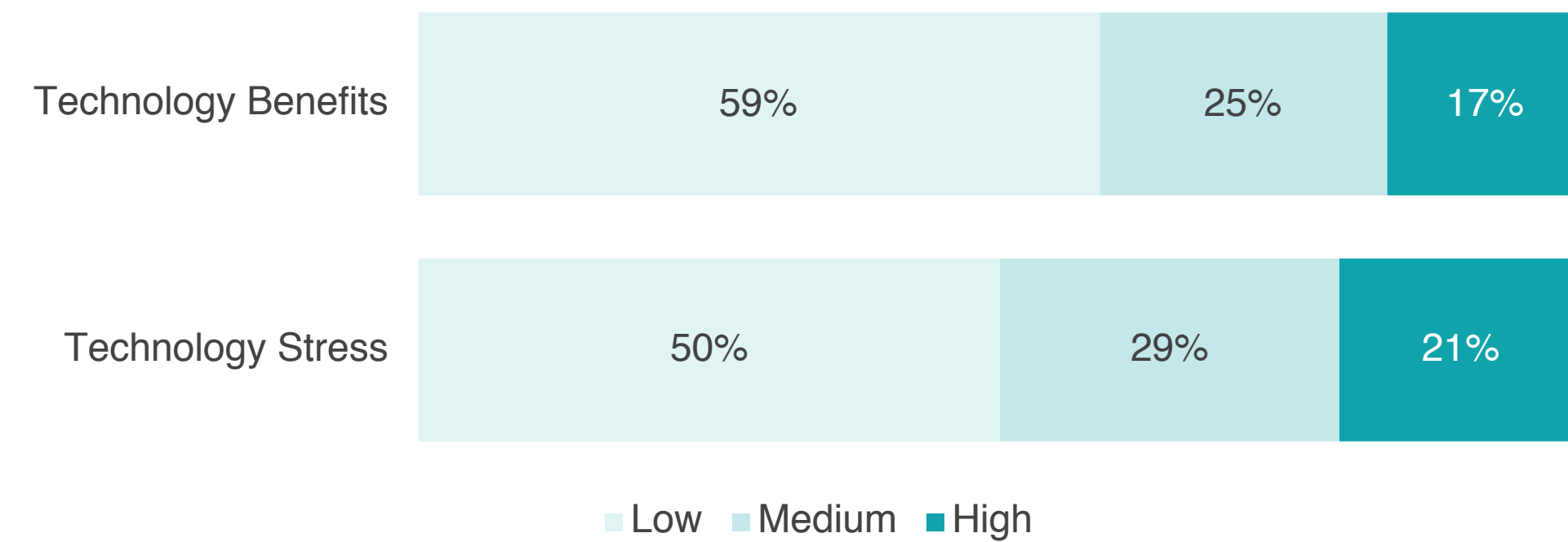
Strivers   Well-Adapted   Unhappy Campers   Coasters

Parents in Germany do daily activities with their child, such as doing homework and learning new things, less frequently than the global average for these activities. However, three-quarters report that their child shares what's going on in their lives -- similar to the global average. German parents report average levels of optimism about their child's future and lower levels of concern about their child's academic progress or emotional wellbeing. They are less likely than parents in other countries to believe that it's important for their child to have strict rules.

Demographic trends: Family wellbeing is associated with income: higher income families report higher wellbeing scores. Parents in urban areas also report higher wellbeing levels than parents in rural or urban areas.

Family stress levels are higher among urban parents than rural parents. Family stress does not differ by income level, although low income parents are more likely than high income parents to report worries about their child finances.

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average≈

GENERAL PROFILE

German families exhibit moderate levels of family wellbeing and family stress. However, they engage less frequently in activities with their child and exhibit less concerns about their child than their counterparts in other countries.
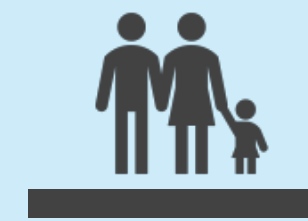
FAMILY WELLBEING

Family is described completely/very well as:
- Happy, 50%◉
- Close-knit, 60%▲

Very/extremely satisfied with:
- Being safe, 38%◉
- Being financially secure, 30%◉
- Spending time with family, 46%◉
- Being role model to child, 47%◉
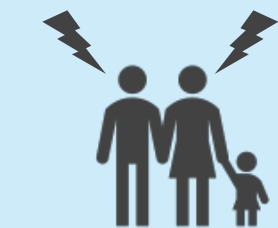
FAMILY STRESS

Family is described completely/very well as:
- Stressed-out, 16%◉
- Always rushed for time, 15%◉
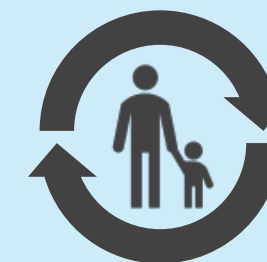
PARENTAL ENGAGEMENT

Do activities with child daily:
- Homework, 25%▼
- Learn and study new things, 20% ▼
- Eat dinner, 52%◉

Child shares what's going on in life, 75%◉
Children should do as told, 52%◉
It's important for my child to have strict rules, 46%▼
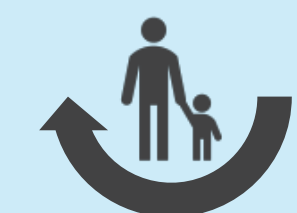
PARENTAL CONCERNS

Optimistic about child's future, 68%◉
Very/extremely concerned about:
- Child's academic performance, 20%▼
- Child's emotional wellbeing, 17%▼

Worry frequently about child's safety, 55%▼

German parents and teens exhibit some of the lowest scores regarding the benefits of digital technology to their families' safety, productivity, connection or child's development. However, they are also among the least technology-stressed families.

Safety vs. Danger: Don't see digital technology as helping to keep their family safe, but have fewer worries about child's safety and tech dangers.

Productivity vs. Waste: Both parents and teens are less likely to think that using digital tech is a productive use of their time. However, they are also less concerned about digital addiction.

Healthy Development vs. Developmental Harm: More likely to believe that digital tech has no impact on their child's intellectual development, social life or emotional wellbeing.

Connection vs. Isolation: More likely to see digital technology as having no impact on family connection.

Urban and higher-income families rate both technology benefits and technology-related stress higher than suburban/rural or lower-income families.

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

TECHNOLOGY PROFILE

German parents and teens are less likely than their counterparts in other countries to see positive effects of digital technology on their lives.

SAFETY

- Digital tech has no impact on keeping family safe, 55%▲
- Tech helps often to keep child safe, 25%▼
- Use tech to stay in touch with family daily, 35%▼
- Use geolocation to keep track of child, 45%▼
- Worry often about inappropriate content on digital tech, 27%▼

DEVELOPMENT

Digital tech has positive effect on child's:
- Intellectual development, 47%▼
- Social life, 40%▼
- Emotional wellbeing, 39%▼

Tech often helps child:
- Gain knowledge and skill, 41%▼
- Succeed in school, 35%▼
- Become more independent, 26%▼
- Make or strengthen friendships, 25%▼

PRODUCTIVITY

Use of tech is often a productive use of my time, parents: 29%▼, teens: 36%▼

Use of tech is often a productive use of child's time, 25%▼

Use tech weekly:
- For family scheduling (40%▼) and planning events, 33%◉
- To shop online, 49%◉
- For information on child's school, 36%▼
- To learn new skills, 40%▼

Worry often about child's (24%▼) and own digital addiction, 17%◉

Child often wastes time using tech, 26%◉

Child often stays up late (20%◉) or skips meals to use tech, 12%▼

CONNECTION

Tech has positive effect on:
- Feeling connected as a family, 41%▼
- Balancing alone and together time, 38%▼
- Spending IRL together, 35%▼
- Stay in touch with extended family, 64%◉

Use tech often to:
- Spend more time together as a family, 23%▼
- Relax and unwind, 30%▼
- Occupy or pacify child (38%▼) or as a reward, 32%▼

Tech is often a source of tension, 17%◉

IN SEARCH OF BALANCE

The majority of Germans contend that their family has a good balance of using digital tech and staying unplugged.

German parents tend to have fewer rules around their child's use of technology, and they are less likely to monitor what their child is watching. However, nearly half of German families have the rule of no devices during dinner (similar to global average).

The majority (52%) of parents feel overwhelmed by constant changes and developments in digital technology, in line with the global average, but less than many countries.

Only roughly a third of German parents are interested in information about how to use digital technology to improve their family's wellbeing (tied with Japan for the lowest interest).

While many German parents feel overwhelmed by constant changes in technology, most are not interested in information on how to use tech to improve their family wellbeing.

BALANCE

Family often has a good balance between tech and unplugged times, 53%◉
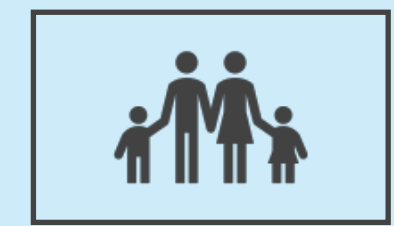
FAMILY RULES

Have rules around digital tech:
- Amount of time child can use tech, 34%◉
- What child can watch 35%◉
- No devices during dinner, 47%◉
- Use parental control apps to control time on tech (10%▼) or block content, 12%▼
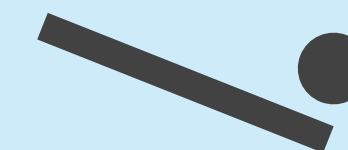
FEELING OVERWHELMED

Feel overwhelmed by constant changes in technology, 52% ◉

SEEKING HELP

Interested in information on digital wellbeing, 36%▼

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

DIGITAL WELLBEING OF FAMILIES

RUSSIA

RUSSIA SAMPLE

CHILDREN

49% 51%

SMARTPHONE OS

58% 22%
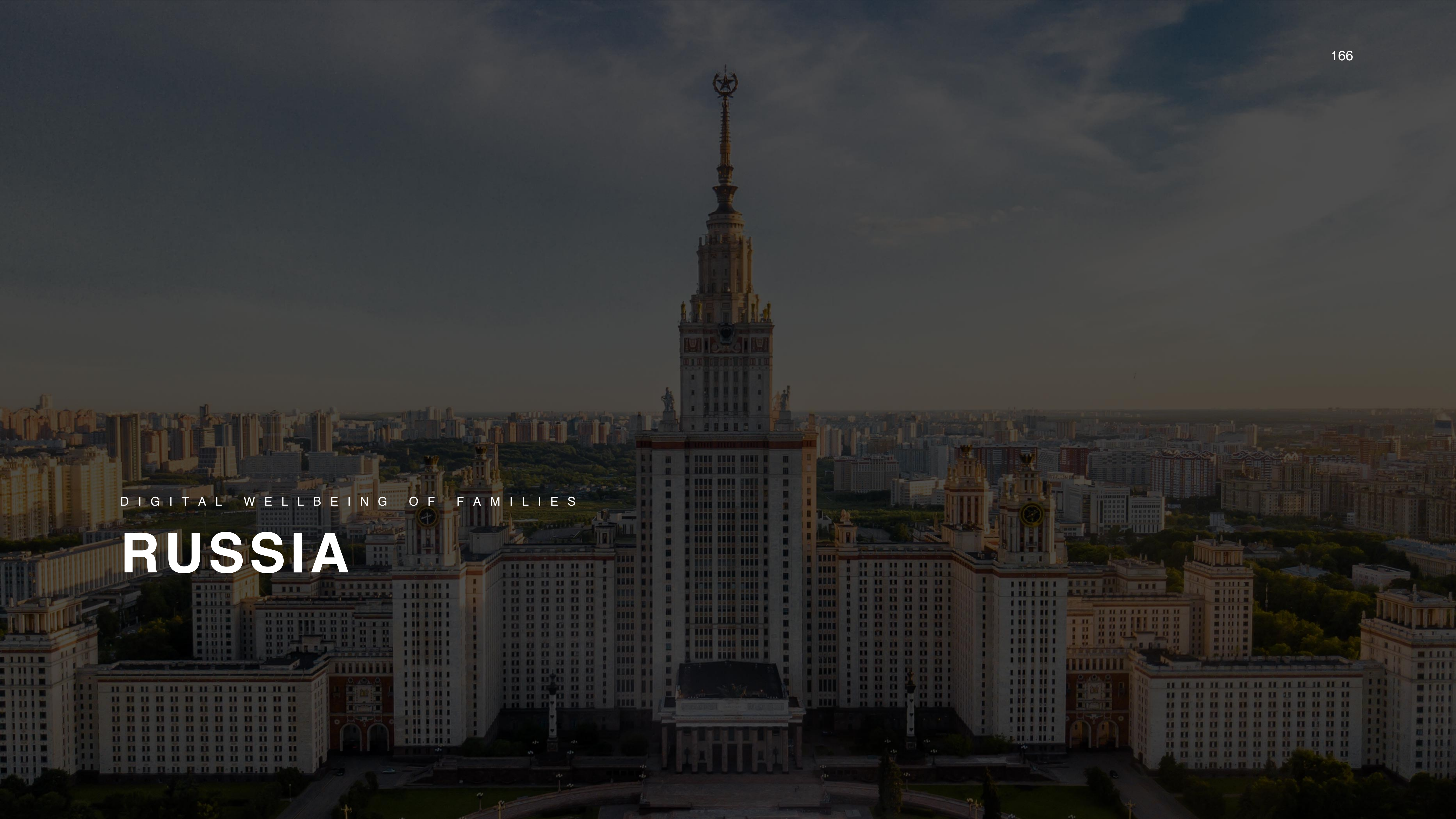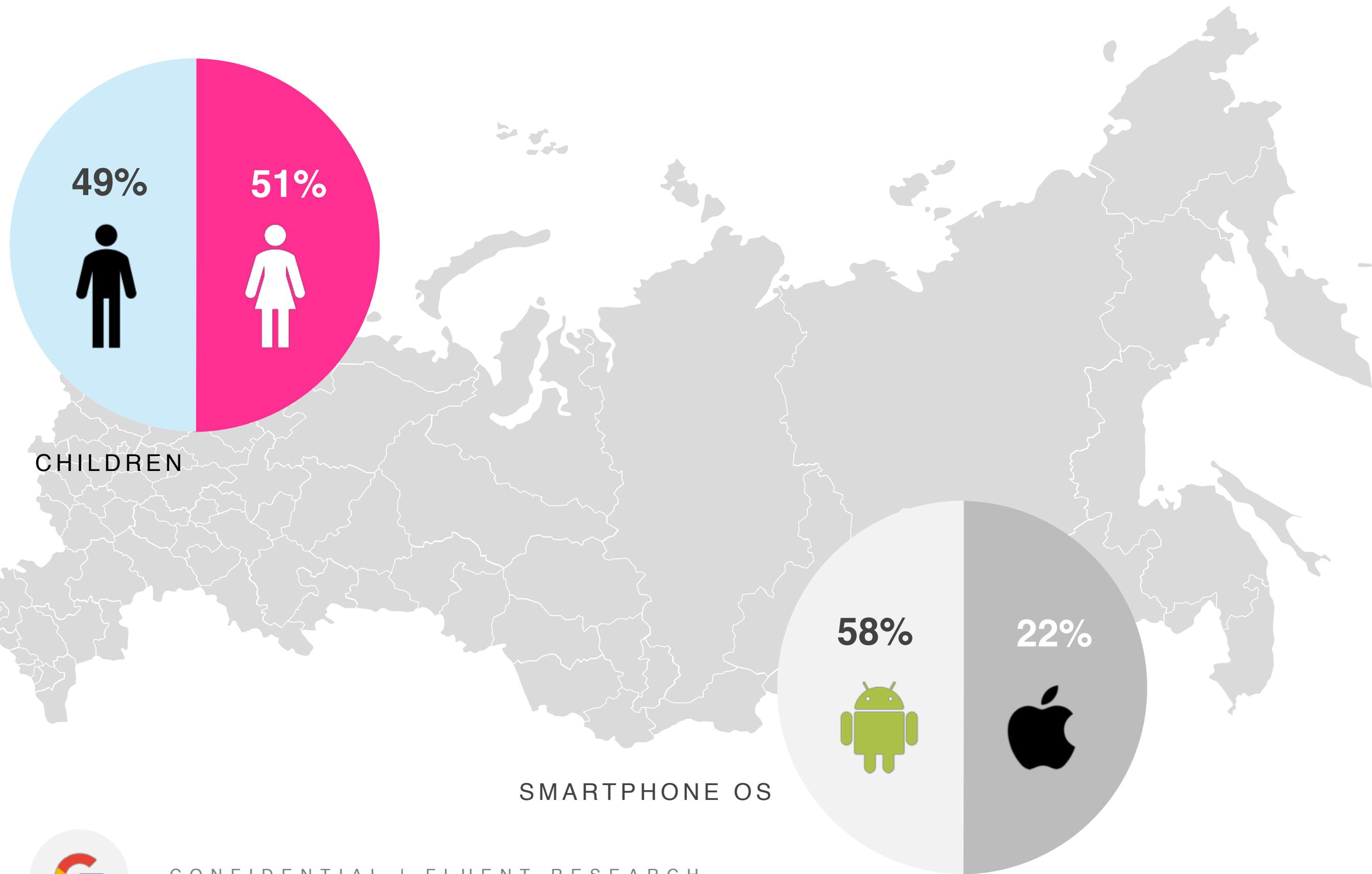
	Total	Strivers	Well-Adapted	Unhappy Campers	Coasters
N	1111	109	52	367	579
Size of segment	NA	10%	5%	33%	52%
Age of Parent: <40 years	61%	44%	65%	62%	62%
Age of Parent: 40+ years	39%	56%	35%	38%	37%
Gender of Parent: Male	40%	41%	37%	41%	41%
Gender of Parent: Female	60%	59%	63%	59%	59%
Age of Child: 2 – 5 years	24%	10%	27%	19%	29%
Age of Child: 6 – 12 years	29%	29%	38%	29%	27%
Age of Child: 13 – 18 years	47%	61%	35%	51%	44%
Gender of Child: Male	49%	48%	48%	51%	48%
Gender of Child: Female	51%	52%	52%	49%	52%
Total Number of Children in HH: One	49%	50%	38%	52%	48%
Total Number of Children in HH: Two ore more	51%	51%	62%	48%	52%
Marital Status: Married/Living with Partner	86%	87%	87%	87%	87%
Marital Status: Other	13%	14%	14%	13%	14%
Parent Education: College degree or more	63%	58%	64%	64%	64%
Urban	87%	86%	90%	89%	85%
Suburban/Rural	14%	14%	10%	11%	15%
Smartphone OS: Android	58%	64%	57%	60%	55%
Smartphone OS: iOS	22%	29%	31%	18%	23%
Region: Central	28%	34%	37%	25%	28%
Region: Volga	20%	26%	15%	23%	17%
Region: Northwestern	14%	9%	13%	14%	14%
Region: Southern	13%	9%	10%	12%	15%
Region: Siberian	10%	11%	10%	11%	9%
Region: Other	15%	11%	15%	16%	16%

OVERVIEW

Russian families are characterized by low engagement with digital technology: they are among the least likely (along with Germany and Japan) to acknowledge the benefits of digital technology to their child's development or their family's wellbeing. They are also among the least likely to feel technology-related stress (similar to Germany). Russian families score very low on their family wellbeing, but also very low on family stress. This is reflected in the distribution of personas in Russia: it has the highest proportion of Coasters, and very few Well-Adapted (similar to Germany).

TECHNOLOGY OUTLOOK

	Low	Medium	High
Technology Benefits	48%	37%	15%
Technology Stress	50%	35%	15%

Legend: ■ Low ■ Medium ■ High

PERSONAS

- Strivers: 10%
- Well-Adapted: 5%
- Unhappy Campers: 33%
- Coasters: 52%
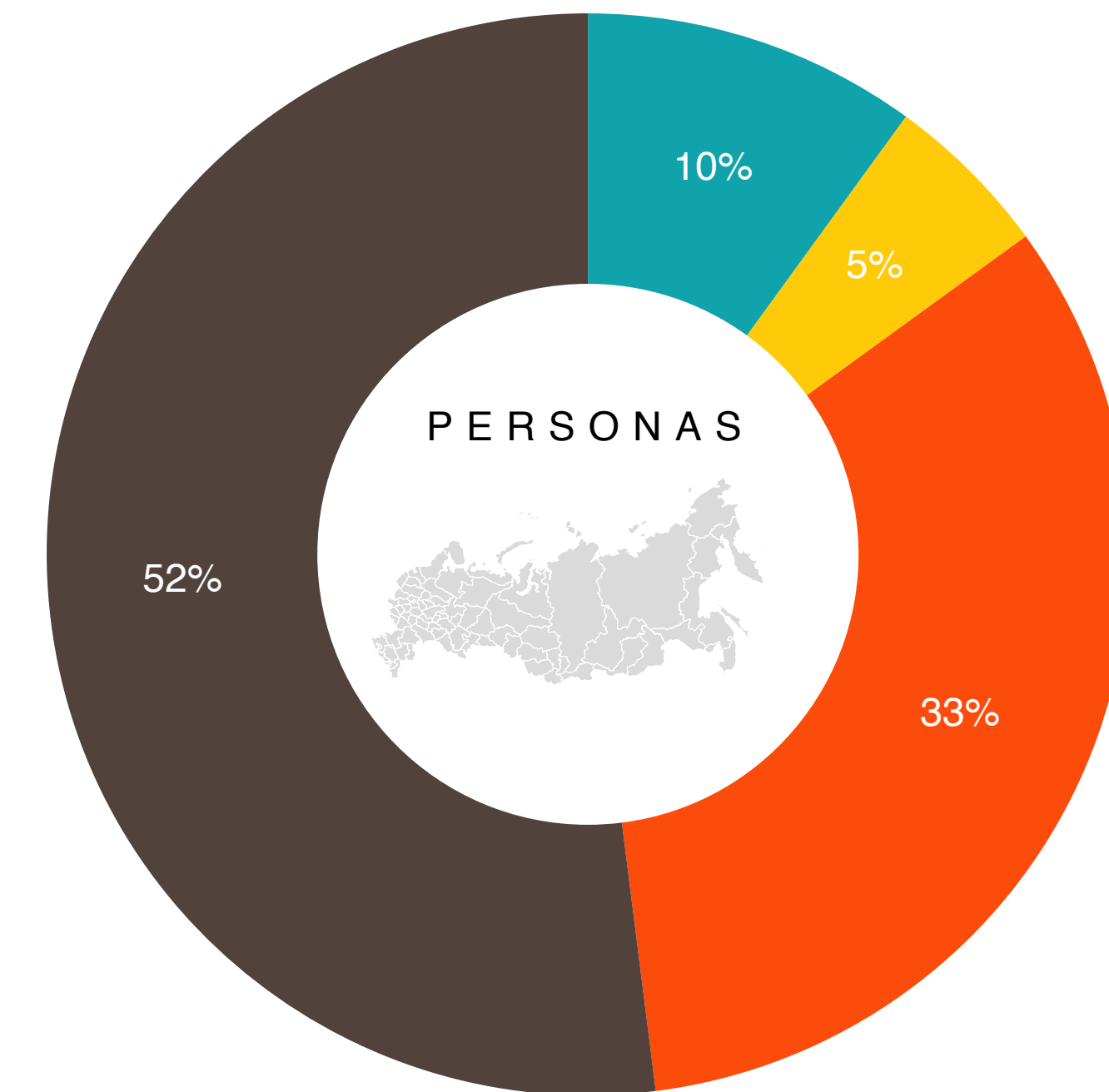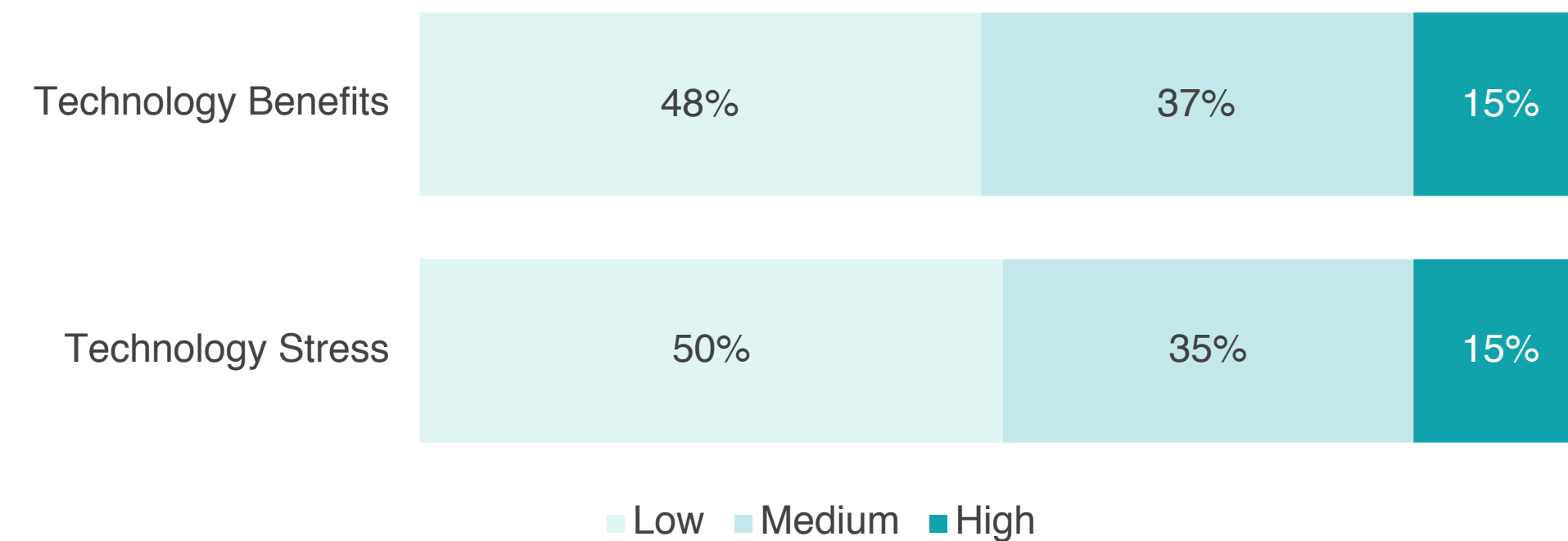
Legend: ■ Strivers ■ Well-Adapted ■ Unhappy Campers ■ Coasters

Russian families exhibit the lowest wellbeing scores (second only to Japan) and the lowest family stress scores. They are the least likely to describe their families as stressed-out or rushed for time.

Parents in Russia engage in daily activities with their child, such as eating dinner and spending unplugged time, similar to the global average for these activities. And they seem to have open channels of communication with their child. Three-quarters report that their child shares what's going on in their lives -- similar to the global average. Russian parents report average levels of optimism about their child's future and lower levels of concern about their child's emotional wellbeing. Russian parents appear to have more empowering parenting styles: they are more likely than parents in other countries to say that children should be allowed to make their own decisions and the least likely to believe that it's important for their child to have strict rules.

Demographic trends: Family wellbeing is associated with income: higher income Russian families report higher wellbeing scores than lower income Russian families.

GENERAL PROFILE

Russian families exhibit the lowest levels of family wellbeing and family stress. They are engaged parents who trust their children to make their own decisions.

FAMILY WELLBEING

Family is described completely/very well as:
- Happy, 25%▼
- Close-knit, 25%▼

Very/extremely satisfied with:
- Being safe, 13%▼
- Being financially secure, 6%▼
- Spending time with family, 25%▼
- Being role model to child, 15%▼

FAMILY STRESS

Family is described completely/very well as:
- Stressed-out, 3%▼
- Always rushed for time, 6%▼
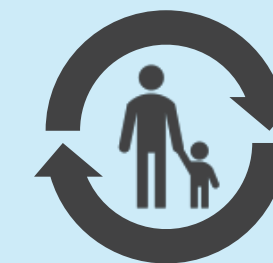
PARENTAL ENGAGEMENT

Do activities with child daily:
- Homework, 28%▼
- Eat dinner, 63%◉
- Learn/study new things, 22%▼
- Spend unplugged time, 35%◉

Child shares what's going on in life, 75%◉

Children should be allowed to make their own decisions, 73%▲

It's important for my child to have strict rules, 44%▼

PARENTAL CONCERNS

Optimistic about child's future, 78%◉

Very/extremely concerned about:
- Child's academic performance, 36%◉
- Child's emotional wellbeing, 28%▼

Frequently worry about child's safety, 75%◉

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average≈

Russian families exhibit some of the lowest scores regarding the benefits of digital technology to their families' safety, productivity, connection or child's development. However, they are also among the least technology-stressed families.

Safety vs. Danger: Don't see digital technology as helping to keep their family safe and rarely use geolocation. However, Russian parents use tech to stay in touch with their child and they are worried about child's safety and tech dangers, albeit at levels lower than the global average.

Productivity vs. Waste: Russian parents do not see tech as a productive use of time, but teens disagree. Parents use tech for family scheduling less frequently than parents in other countries. They worry about their child's potential digital addiction, but not their own.

Healthy Development vs. Developmental Harm: Less likely to believe that tech helps their child succeed in school, become independent or make and strengthen friendships.

Connection vs. Isolation: Among the least likely (with Japan and Germany) to see digital tech as having a positive effect on feeling connected as a family.

TECHNOLOGY PROFILE

Russian parents are less likely than their counterparts in other countries to see positive effects of digital technology on their lives.

SAFETY

- Digital tech has no impact on keeping family safe, 52%▲
- Tech helps often to keep child safe, 20%▼
- Use tech to stay in touch with family daily, 53%◉
- Use geolocation to keep track of child, 41%▼
- Worry often about inappropriate content on digital tech, 36%◉

DEVELOPMENT

Digital tech has positive effect on child's:
- Intellectual development, 68%◉
- Social life, 48%◉
- Emotional wellbeing, 43%▼
Tech often helps child:
- Gain knowledge and skills, 46%◉
- Succeed in school, 37%▼
- Become more independent, 22%▼
- Make or strengthen friendships, 24%▼

PRODUCTIVITY

Use of tech is often a productive use of my time, parents: 28%▼, teens: 47%◉
Use of tech is often a productive use of child's time, 22%▼
Use tech weekly:
- For family scheduling (30%▼) and planning events, 20%▼
- To shop online, 39%▼
- For information on child's school, 56%◉
- To learn new skills, 47%▼
Worry often about child's (37%◉) and own digital addiction, 15%▼
Child often wastes time using tech, 29%◉
Child often stays up late (18%▼) or skips meals to use tech, 6%▼

CONNECTION

Tech has positive effect on:
- Feeling connected as a family, 41%▼
- Balancing alone and together time, 34%▼
- Spending IRL together, 32%▼
- Try new activities to do together, 53%◉
- Staying in touch with extended family, 71%◉
Use tech often to:
- Spend more time together as a family, 16%▼
- Relax and unwind, 38%◉
- Occupy or pacify child (42%▼) or as a reward, 31%▼
Tech is often a source of tension, 10%▼

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

Nearly one in two Russian families feel that they have a good balance of using digital technology and staying unplugged.

Russian parents are less likely to use parental controls to monitor the amount of time their child spends on digital technology or what their child is watching. While Russian parents have rules around the use of technology, they are more lax about screentime during dinner.

Russian parents are less likely than parents in other countries to feel overwhelmed by constant changes and developments in digital technology. Nevertheless, two-thirds of Russian parents are interested in information about how to use digital technology to improve their family's wellbeing.

IN SEARCH OF BALANCE

Roughly half of Russian families feel that they have a good balance between tech and unplugged times. While they are less likely to feel overwhelmed by constant changes in technology, they are interested in learning how tech can help improve their family wellbeing.

BALANCE

Family often has a good balance between tech and unplugged times, 49%◉
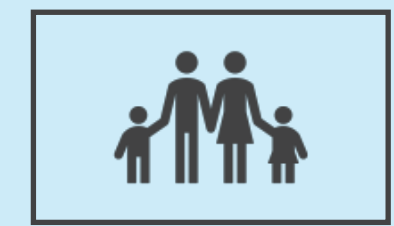
FAMILY RULES

Have rules around digital tech:
- Amount of time child can use tech, 33%◉
- What child can watch, 32%◉
- No devices during dinner, 30%▼
- Use parental control apps to control time on tech (7%▼) or block content, 13%▼
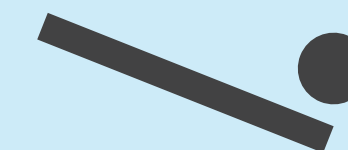
FEELING OVERWHELMED

Feel overwhelmed by constant changes in technology, 42%▼

SEEKING HELP

Interested in information on digital wellbeing, 65%◉

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

DIGITAL WELLBEING OF FAMILIES

JAPAN

JAPAN SAMPLE

50% **50%**

CHILDREN

34% **56%**

SMARTPHONE OS
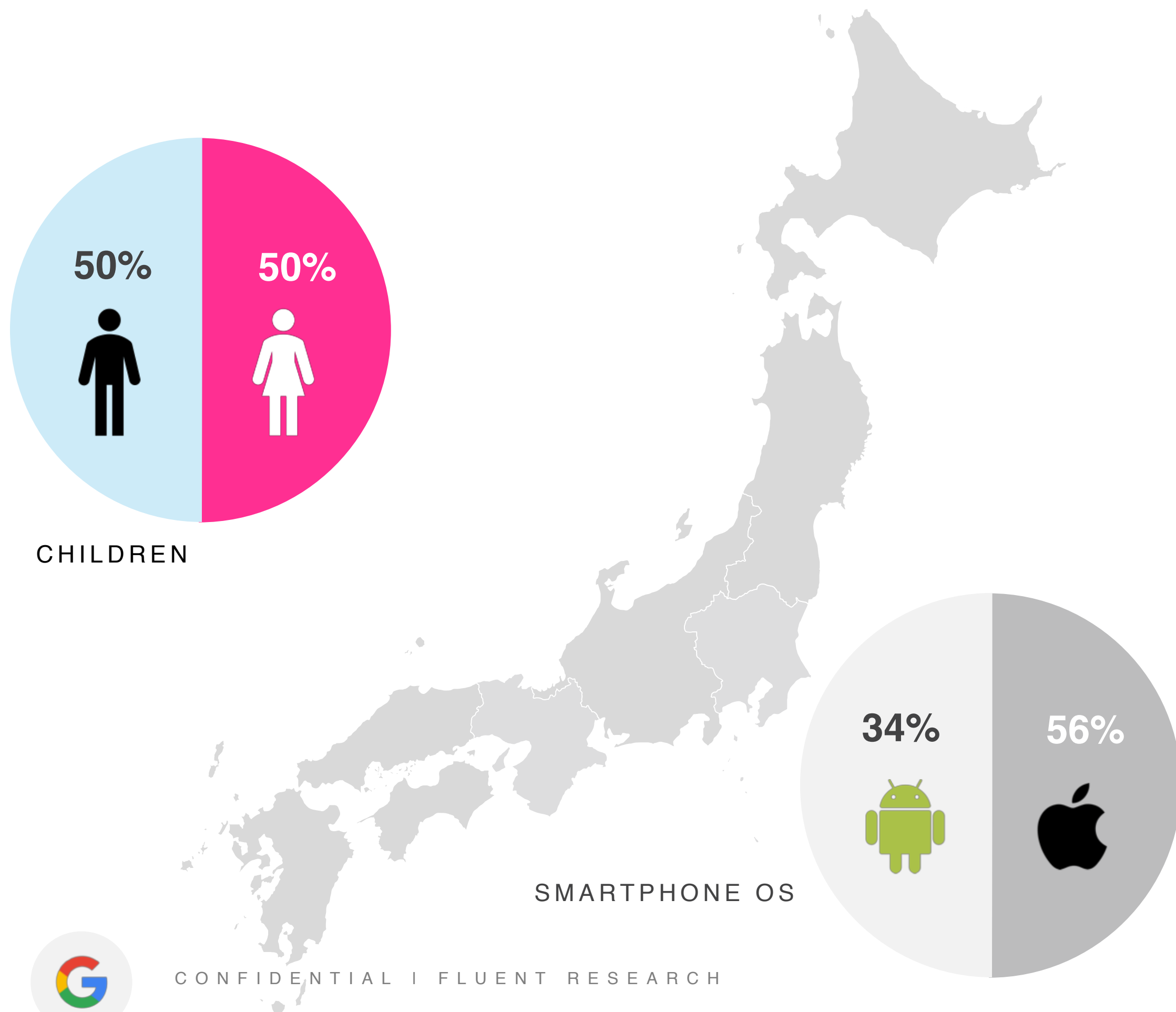
	Total	Strivers	Well-Adapted	Unhappy Campers	Coasters
N	1022	112	31	422	454
Size of segment	NA	11%	3%	41%	45%
Age of Parent: <40 years	32%	42%	39%	27%	34%
Age of Parent: 40+ years	68%	58%	61%	73%	66%
Gender of Parent: Male	55%	61%	68%	55%	52%
Gender of Parent: Female	45%	39%	32%	45%	48%
Age of Child: 2 – 5 years	25%	20%	26%	17%	33%
Age of Child: 6 – 12 years	25%	26%	32%	26%	23%
Age of Child: 13 – 18 years	50%	54%	42%	57%	44%
Gender of Child: Male	50%	57%	45%	55%	45%
Gender of Child: Female	50%	43%	55%	45%	55%
Total Number of Children in HH: One	46%	58%	32%	46%	43%
Total Number of Children in HH: Two ore more	54%	42%	67%	54%	56%
Marital Status: Married/Living with Partner	93%	89%	97%	94%	95%
Marital Status: Other	6%	11%	3%	5%	5%
Parent Education: College degree or more	53%	65%	68%	50%	53%
Urban	63%	71%	61%	63%	61%
Suburban/Rural	37%	29%	39%	37%	39%
Smartphone OS: Android	34%	28%	27%	34%	35%
Smartphone OS: iOS	56%	64%	60%	57%	54%
Region: Kanto	42%	53%	52%	40%	41%
Region: Kansai	15%	16%	19%	17%	12%
Region: Chubu	14%	10%	13%	14%	16%
Region: Other	29%	21%	16%	29%	30%

OVERVIEW

Japan is distinguished by its combination of a high number of Unhappy Campers, hardly any Well-Adapted and a countrywide tendency to report a lack of balance between using digital technology and staying unplugged. Japanese parents also have the lowest tech usage among the countries surveyed. While they are the least likely to say digital technology often helps their child gain knowledge and skills or become more independent, they are also less likely to view it as a distraction.

TECHNOLOGY OUTLOOK

	Low	Medium	High
Technology Benefits	60%	28%	12%
Technology Stress	43%	39%	18%

PERSONAS

- 11% (Strivers)
- 3% (Well-Adapted)
- 41% (Unhappy Campers)
- 45% (Coasters)
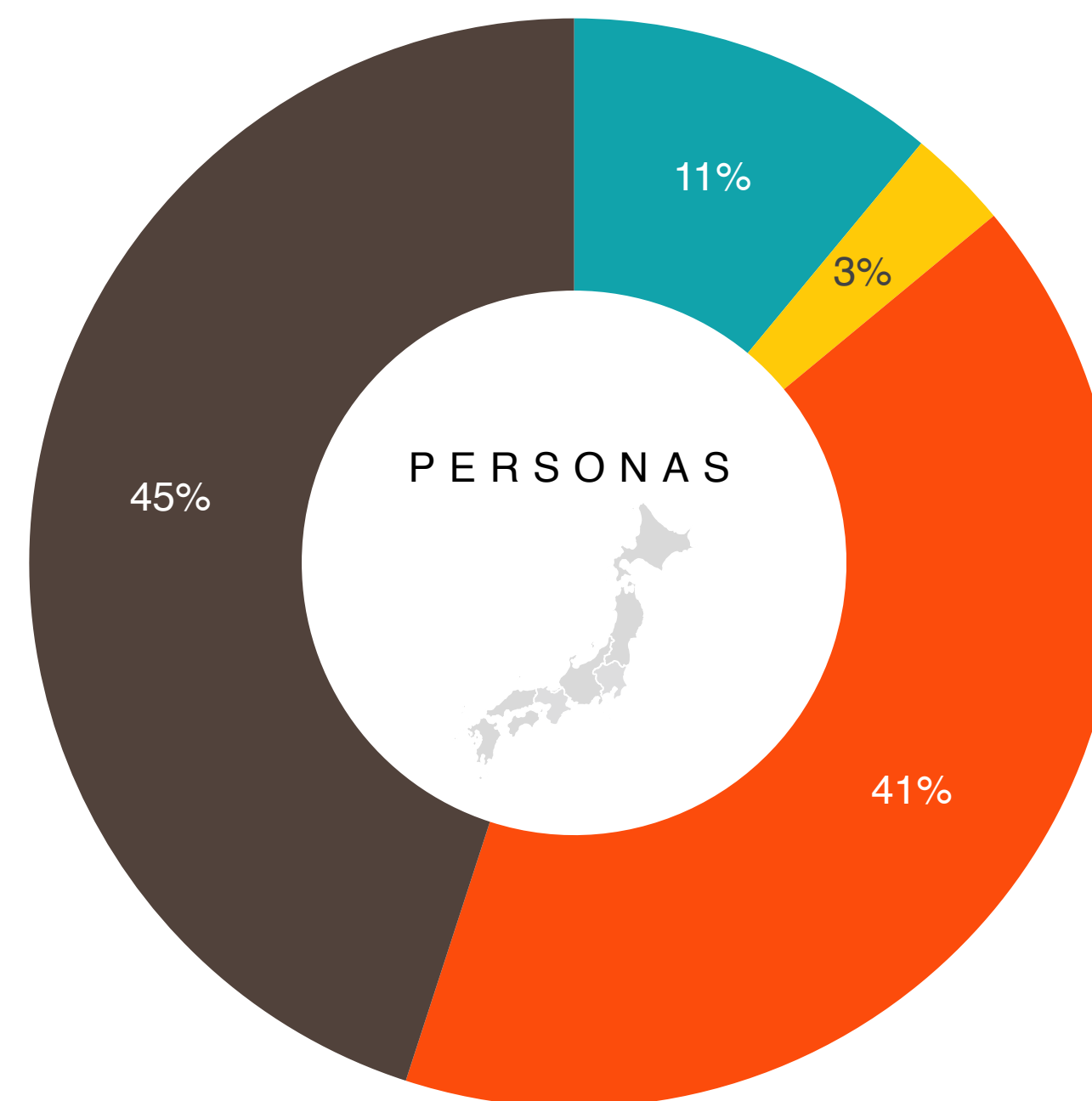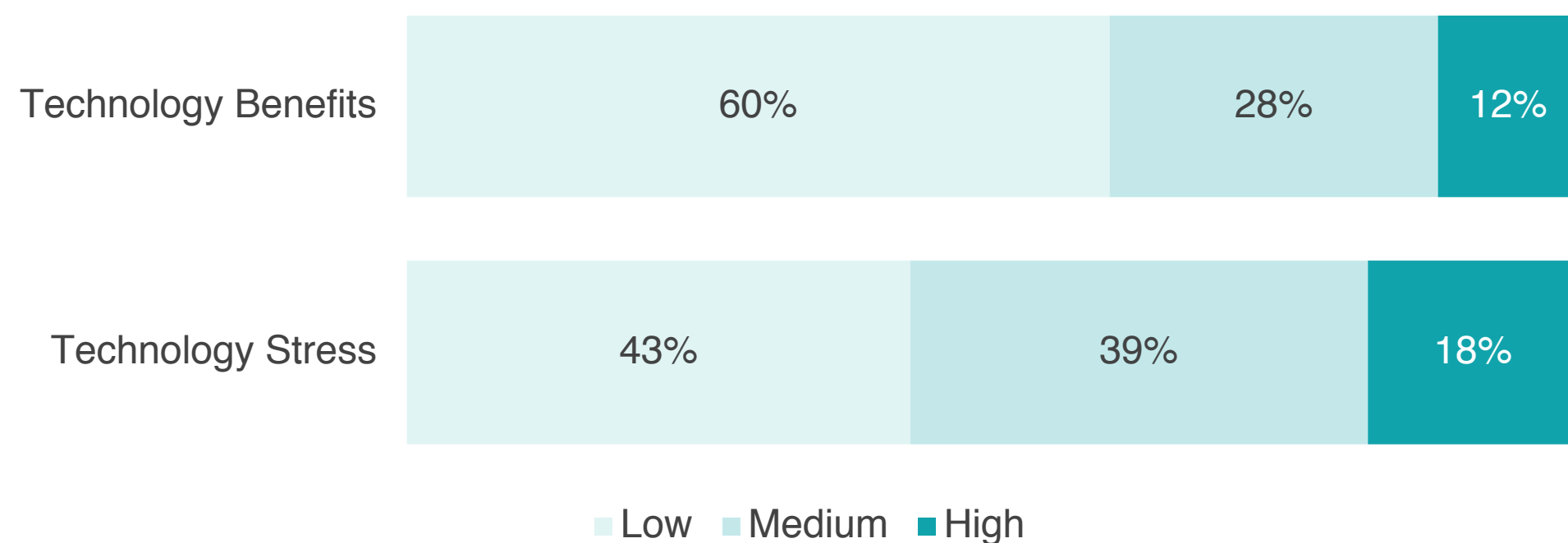
Legend: ■ Strivers ■ Well-Adapted ■ Unhappy Campers ■ Coasters

Japanese families score very low on the wellbeing index (69% in the low wellbeing segment; only 9% in the high wellbeing group) – the lowest score, comparable only to Russia. However, they are also less stressed than their counterparts in other countries (only 9% in high stress group).

While parents in Japan eat dinner daily with their child at a rate similar to the global average, they are less likely to do homework or spend "unplugged" time with their child daily. Only one-third of Japanese parents are optimistic about their child's future – a significantly lower percentage than in any other country. Yet, Japanese parents tend to be less concerned about their child's academic performance or emotional well-being. The majority report that their child shares what's going on in their lives – but fewer than the global average. They are less likely than parents overall to believe that children should do what they're told; however, they are the least likely of all parents to agree that children should be allowed to make their own decisions. Although they report lower levels of family stress, their worries about their child's safety and wellbeing and their family's financial situation are comparable to the global averages.

Demographic trends: Higher income and urban Japanese families report higher wellbeing scores than lower income or rural Japanese families. Higher income families report the lowest levels of family stress. Low income families express more concern about finances.

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

GENERAL PROFILE

Japanese families exhibit low levels of family wellbeing but also low levels of family stress.

FAMILY WELLBEING

Family is described completely/very well as:
- Happy, 19%▼
- Close-knit, 20%▼

Very/extremely satisfied with:
- Being safe, 19%▼
- Being financially secure, 11%▼
- Spending time with family, 19%▼
- Being role model to child, 9%▼

FAMILY STRESS

Family is described completely/very well as:
- Stressed-out, 10%▼
- Always rushed for time, 9%▼
- Isolated/disconnected from each other, 5%▼
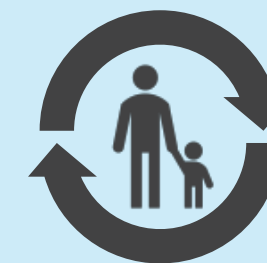
PARENTAL ENGAGEMENT

Do activities with child daily:
- Homework, 15%▼
- Eat dinner, 59%◉
- Spend unplugged time, 24%▼

Child shares what's going on in their life, 60%▼
Children should do as told, 34%▼
Children should be allowed to make their own decisions, 15%▼

PARENTAL CONCERNS

Optimistic about child's future, 35%▼
Very/extremely concerned about:
- Child's academic performance, 28%▼
- Child's emotional wellbeing, 15%▼

Worry frequently about child's safety, 71%◉

Parents in Japan report the lowest digital technology usage of all countries surveyed. They give the lowest ratings to the benefits of digital technology to their families' safety, productivity, connection or child's development. They also appear immune to the technology-related stress.

Safety vs. Danger: Japanese parents worry about their child's safety, but they do not see digital tech as helping to keep their child or their family safe. They are the least likely of all countries to use geolocation to keep track of their child. At the same time, Japanese parents worry less than other parents about inappropriate content on digital technology.

Productivity vs. Waste: Neither adults nor teens think using digital tech is a productive use of their time. They are also less concerned about digital addiction, and less likely to view tech as a distraction.

Healthy Development vs. Developmental Harm: Parents are the least likely of all countries to think that digital tech has a positive effect on their child's intellectual development or social life.

Connection vs. Isolation: Japanese families are the least likely to see a positive role of technology in bringing their family together. But they are also the least likely to experience digital technology as a source of tension or disagreements in the family.

Demographic trends: Higher income and urban Japanese families report higher tech benefits and tech stress scores than lower income or rural Japanese families.

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

TECHNOLOGY PROFILE

Japanese families are the least frequent users of digital technology, and they are the least likely to see either positive or negative effects of digital technology on their lives.

SAFETY

- Digital tech has no impact on keeping family safe, 54%▲
- Tech helps often to keep child safe, 14%▼
- Use tech to stay in touch with family daily, 39%▼
- Use geolocation to keep track of child, 36%▼
- Worry often about inappropriate content on digital tech, 24%▼

DEVELOPMENT

Digital tech has positive effect on child's:
- Intellectual development, 45%▼
- Social life, 34%▼
- Emotional wellbeing, 41%▼
Tech often helps child:
- Gain knowledge and skill, 21%▼
- Succeed in school, 14%▼
- Become more independent, 9%▼
- Make or strengthen friendships, 19%▼

PRODUCTIVITY

Use of tech is often a productive use of my time, parents: 21%▼, teens: 20%▼
Use of tech is often a productive use of child's time, 13%▼
Use tech weekly:
- For family scheduling (31%▼) and planning events, 16%▼
- To shop online, 28%◉
- For information on child's school, 24%▼
- To learn new skills, 38%▼
Worry often about child's (27%▼) and own digital addiction, 18%▼
Child wastes time using tech often, 18%▼
Child stays up late (17%▼) or skips meals to use tech often, 11%▼

CONNECTION

Tech has positive effect on:
- Feeling connected as a family, 38%▼
- Balancing alone and together time, 32%▼
- Spending IRL time together, 31%▼
- Staying in touch with extended family, 58%▼
Use tech often to:
- Spend more time together as a family, 12%▼
- Relax and unwind, 21%▼
- Occupy or pacify child (27%▼) or as a reward, 25%▼
Tech is often a source of tension, 8%▼
Have arguments with child often about use of tech, 6%▼

IN SEARCH OF BALANCE

Japanese families do not feel that they have a good balance of technology use and staying unplugged: only 23% say that they often find a balance as compared to 50% on average for the global sample.

Japanese parents also tend to have few rules for their children around technology use, and they are less likely than other parents to keep tabs on the content their children watch on digital media.

The majority of Japanese parents (60%) feel overwhelmed by the constant changes and developments in digital technology. Nevertheless, only 38% of parents are interested in information about how to use digital technology to improve family's wellbeing (tied with Germany for the lowest score in interest).

Japanese families are the least likely of all countries to have a good balance between technology use and unplugged times but they are not particularly interested in finding out more about digital wellbeing.

BALANCE

Family often has a good balance between tech and unplugged times, 23%▼
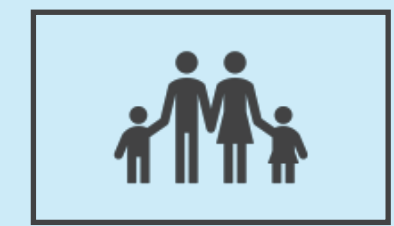
FAMILY RULES

Have rules around digital tech:
- Amount of time child can use tech, 30%▼
- What child can watch, 23%▼
- No devices during dinner, 43%◉
- Use parental control apps to control time on tech (7%▼) or block content, 17%▼

FEELING OVERWHELMED

Feel overwhelmed by constant changes in technology, 60%◉
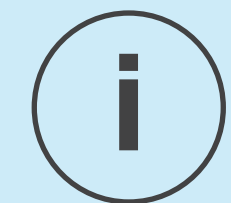
SEEKING HELP

Interested in information on digital wellbeing, 38%▼

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

DIGITAL WELLBEING OF FAMILIES

KOREA

KOREA SAMPLE

50%

50%

CHILDREN

73%

23%

SMARTPHONE OS
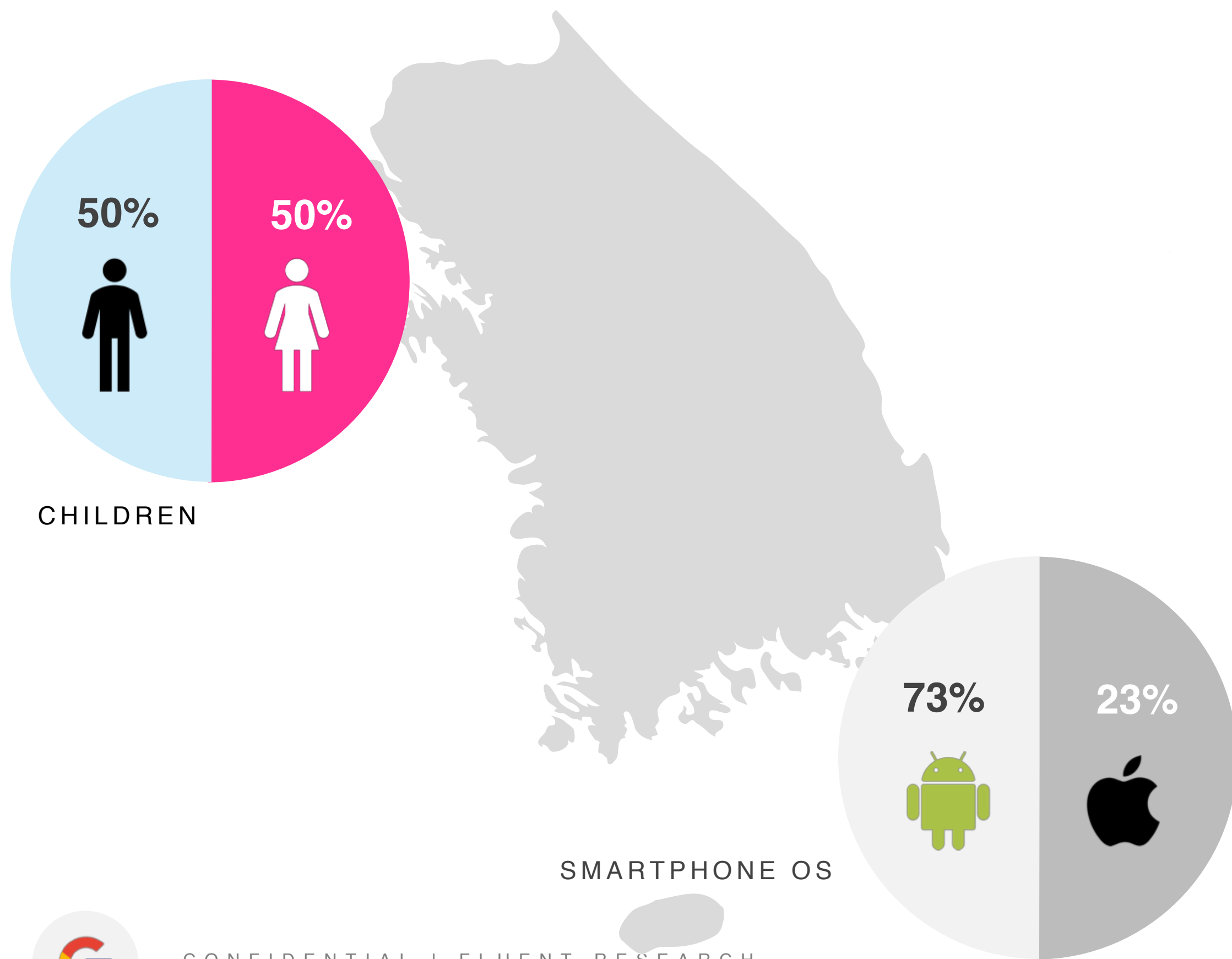
	Total	Strivers	Well-Adapted	Unhappy Campers	Coasters
N	1004	190	32	406	374
Size of segment	NA	19%	3%	41%	37%
Age of Parent: <40 years	37%	42%	47%	34%	37%
Age of Parent: 40+ years	63%	58%	53%	66%	63%
Gender of Parent: Male	49%	38%	59%	49%	52%
Gender of Parent: Female	51%	62%	41%	51%	48%
Age of Child: 2 – 5 years	25%	17%	41%	23%	29%
Age of Child: 6 – 12 years	25%	24%	16%	24%	27%
Age of Child: 13 – 18 years	50%	59%	44%	52%	44%
Gender of Child: Male	50%	48%	28%	54%	47%
Gender of Child: Female	50%	52%	72%	46%	53%
Total Number of Children in HH: One	48%	46%	44%	49%	49%
Total Number of Children in HH: Two ore more	52%	54%	56%	52%	51%
Marital Status: Married/Living with Partner	90%	87%	87%	88%	93%
Marital Status: Other	10%	14%	12%	12%	7%
Parent Education: College degree or more	79%	78%	81%	77%	83%
Urban	90%	88%	97%	90%	91%
Suburban/Rural	10%	12%	3%	10%	8%
Smartphone OS: Android	73%	59%	71%	74%	75%
Smartphone OS: iOS	23%	30%	23%	22%	20%
Region: Gyeonggi	57%	62%	56%	57%	55%
Region: South Gyeongsang	13%	11%	19%	13%	14%
Region: North Gyeongsang	8%	8%	0	6%	11%
Region: South Chungcheong	8%	7%	9%	8%	8%
Region: Other	14%	11%	16%	16%	12%

OVERVIEW

Korean families tend to have less positive views on the benefits of digital technology yet experience average levels of tech stress. Coupled with experiencing lower levels of family wellbeing and average levels of family stress, it is not surprising that the personas that dominate Korea are Unhappy Campers and Coasters. In fact, Korea is one of only two countries where Unhappy Campers outnumber Coasters (Thailand is the other). Well-Adapted represent only 3% of Korean families (the lowest proportion, tied with Japan).

TECHNOLOGY OUTLOOK

	Low	Medium	High
Technology Benefits	49%	36%	16%
Technology Stress	34%	37%	29%

Low Medium High

PERSONAS

- 19% Strivers
- 3% Well-Adapted
- 41% Unhappy Campers
- 37% Coasters

■ Strivers   ■ Well-Adapted   ■ Unhappy Campers   ■ Coasters
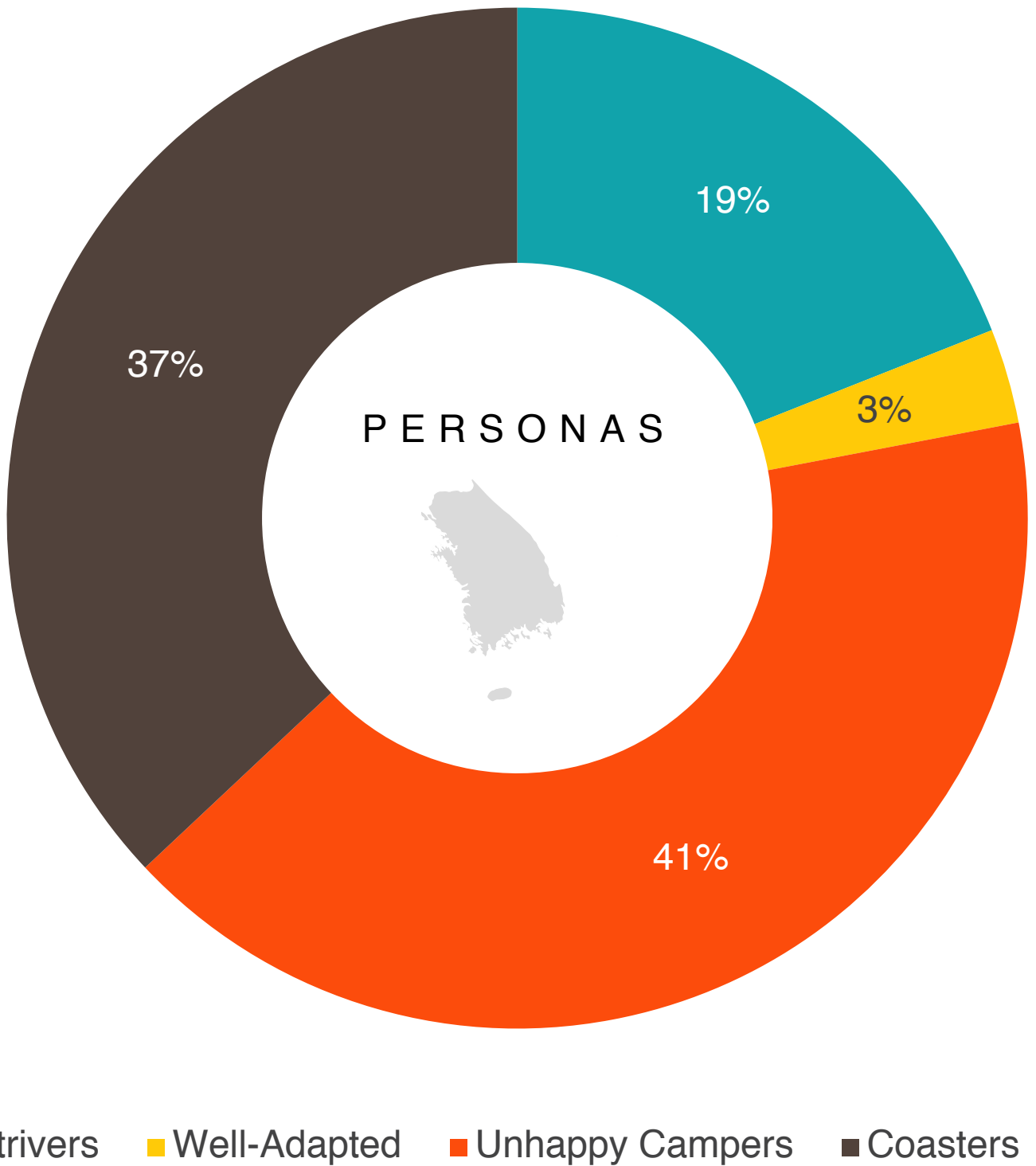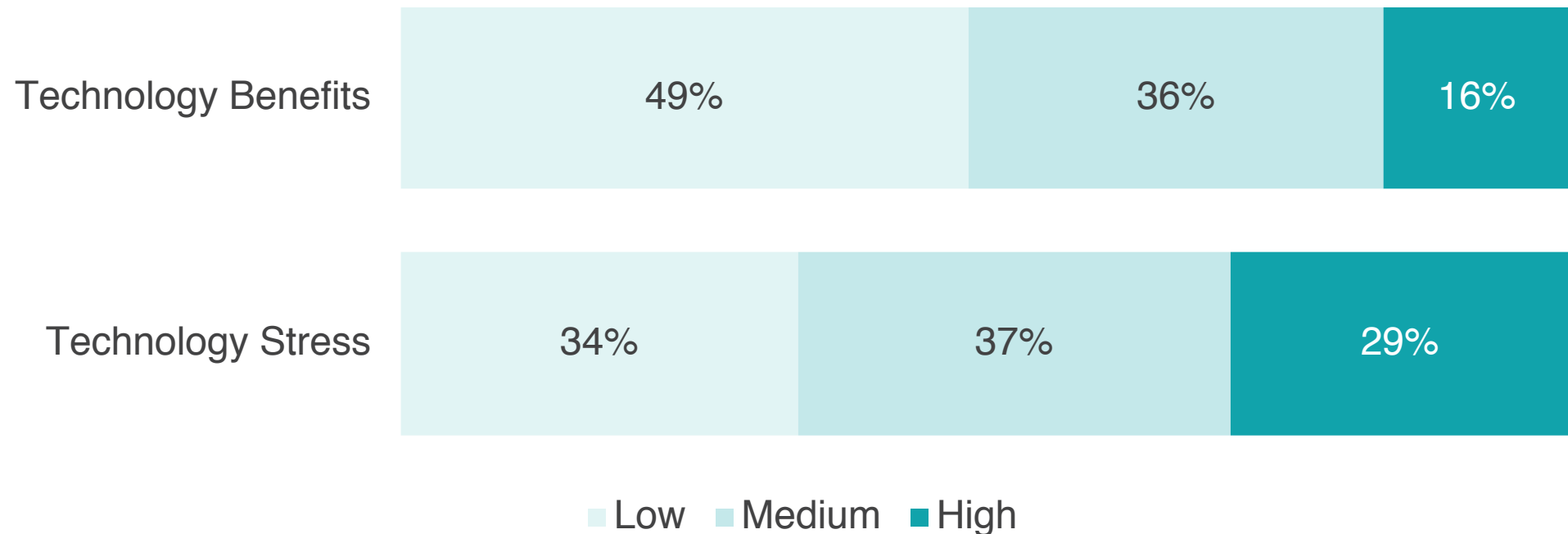
Korean parents describe lower family wellbeing levels and less frequent activities with their child compared to the global average. They are less likely to describe their family as happy or to be highly satisfied with spending time with their family. Among the countries surveyed, parents in Korea are the least likely to report that their child shares what is going on in their life or to know where their child is at all times. Korean parents hold a more pessimistic view of their child's future and their role in it. They report a lower than average level of optimism about their child's future and they are also less likely to be highly satisfied with being a role model for their children. However, this outlook is not associated with more worries for their child; they show less concern about their child's academics or wellbeing than the global average. They also seem to be more lenient in their parenting styles, being the least likely to say that it's important that their child has strict rules or boundaries. One area in which parents in Korea do report levels comparable to the global average levels is family stress – feeling stressed out and always rushed for time.

Demographic trends: Higher income parents in Korea report higher levels of family wellbeing, more frequent family activities and less worries about their child's safety or their family's financial situation. While family stress levels do not differ by income, parents with a university degree report lower levels of family stress.

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

GENERAL PROFILE

Korean parents report family stress levels similar to the global average and lower levels of family wellbeing. Yet they also report less concerns about their child.

FAMILY WELLBEING

Family is described completely/very well as:
- Happy, 29%▼
- Close-knit, 34%▼

Very/extremely satisfied with:
- Being safe, 19%▼
- Being financially secure, 13%▼
- Spending time with family, 25%▼
- Being role model to child, 15%▼

FAMILY STRESS

Family is described completely/very well as:
- Stressed-out, 12%◉
- Always rushed for time, 14%◉
- Isolated/disconnected from each other, 7%▼
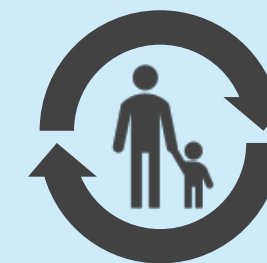
PARENTAL ENGAGEMENT

Do activities with child daily:
- Homework, 25%▼
- Eat dinner, 50%▼
- Spend unplugged time, 32%◉

Child shares what's going on in life, 54%▼
Children should do what they are told, 21%▼
It's important for my child to have strict rules, 40%▼

PARENTAL CONCERNS

Optimistic about child's future, 60%▼
Very/extremely concerned about:
- Child's academic performance, 18%▼
- Child's emotional wellbeing, 18%▼

Worry frequently about:
- Child's safety, 58%◉
- Family's financial situation, 47%▼

Korean families' digital tech usage is on par with the global average. Of note, they index highest on using digital tech to shop online. In contrast, Korean parents are less likely than those in most other countries to use digital tech to keep track of information about their child's school or schoolwork. Parents in Korea attribute less benefits to technology and experience an average level of technology stress.

Safety vs. Danger: Korean parents believe that digital tech has positive effect on keeping their family safe, and they use geolocation to keep track of where their child is. However, they tend to worry less about their child's safety in general.

Productivity vs. Waste: Do not view digital tech as productive use of their time and report levels of worry about child's digital addiction comparable to global levels. Korean parents use tech to shop online most frequently.

Healthy Development vs. Developmental Harm: Less than average views on digital tech's positive impact on child's intellectual development or emotional wellbeing

Connection vs. Isolation: The vast majority believe digital technology helps stay in touch with extended family. However, they do not use digital tech often to spend more time together as a family or mitigate stress.

Demographic trends: Higher income families report higher levels of tech usage and tech benefits, but income levels do not distinguish extent of tech stress for Korean families. Korean parents with college degrees report lower levels of tech stress.

TECHNOLOGY PROFILE

Korean parents report average tech usage levels for staying in touch with family, organizing family's schedule, or rewarding and pacifying their child. However, they are less likely to believe in the positive effects of digital tech on child's intellectual development or emotional wellbeing.

SAFETY

- Digital tech has positive effect on keeping family safe, 57%◉
- Tech helps often to keep child safe, 25%▼
- Use tech to stay in touch with family daily, 61%◉
- Use geolocation to keep track of child, 55%◉
- Worry often about inappropriate content on digital tech, 46%◉

DEVELOPMENT

Digital tech has positive effect on child's:
- Intellectual development, 51%▼
- Social life, 54%◉
- Emotional wellbeing, 41%▼

Tech often helps child:
- Gain knowledge and skills, 38%▼
- Succeed in school, 33%▼
- Become more independent, 26%▼

PRODUCTIVITY

Use of tech is often a productive use of my time, 37%◉
Use of tech is often a productive use of my child's time, 25%▼
Use tech weekly:
- For family scheduling (50%◉) and planning events, 36%◉
- To shop online, 70%▲
- For information on child's school, 39%▼

Worry often about child's (37%◉) and own digital addiction, 30%◉
Child often wastes time using tech, 26%◉
Child often stays up late (24%◉) or skips meals to use tech, 16%◉

CONNECTION

Tech has positive effect on:
- Feeling connected as a family, 48%▼
- Staying in touch with extended family, 80%◉

Use tech often to:
- Spend more time together as a family, 22%▼
- Relax and unwind, 32%▼
- Occupy or pacify child (53%◉) or as a reward, 50%◉

Tech is often a source of tension, 19%◉

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

IN SEARCH OF BALANCE

Most Korean families do not feel that they have a good balance when it comes to digital tech usage and a majority feel overwhelmed by the constant changes associated with digital tech. They also are less likely to have incorporated many of the rules and tools available to parents regarding their children's tech use. They are less likely to have rules about the amount of time their child's spends with digital tech or the content that they experience.

Higher income families in Korea are more likely to report having a good balance in their tech usage, but experience the same sense of feeling overwhelmed as do lower income families.

Overall, about half of Korean parents show interest in getting more information about how to use digital tech to improve their family's wellbeing, less than the global average.

While Korean parents report a lack of balance in their family's tech usage, they tend not to have rules or use parental control apps for their children's use of digital technology.

BALANCE

Family often has a good balance between tech and unplugged times, 34%▼

FAMILY RULES

Have rules around digital tech:
- Amount of time child can use tech, 30%▼
- What child can watch, 28%▼
- No devices during dinner, 40%◉
- Use parental control apps to control time on tech (10%▼) or block content, 16%▼
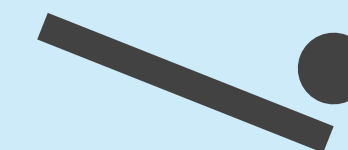
FEELING OVERWHELMED

Feel overwhelmed by constant changes in technology, 67%◉

SEEKING HELP

Interested in information on digital wellbeing, 52%▼

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

DIGITAL WELLBEING OF FAMILIES

INDIA

INDIA SAMPLE

57% 43%

CHILDREN

75% 23%

SMARTPHONE OS
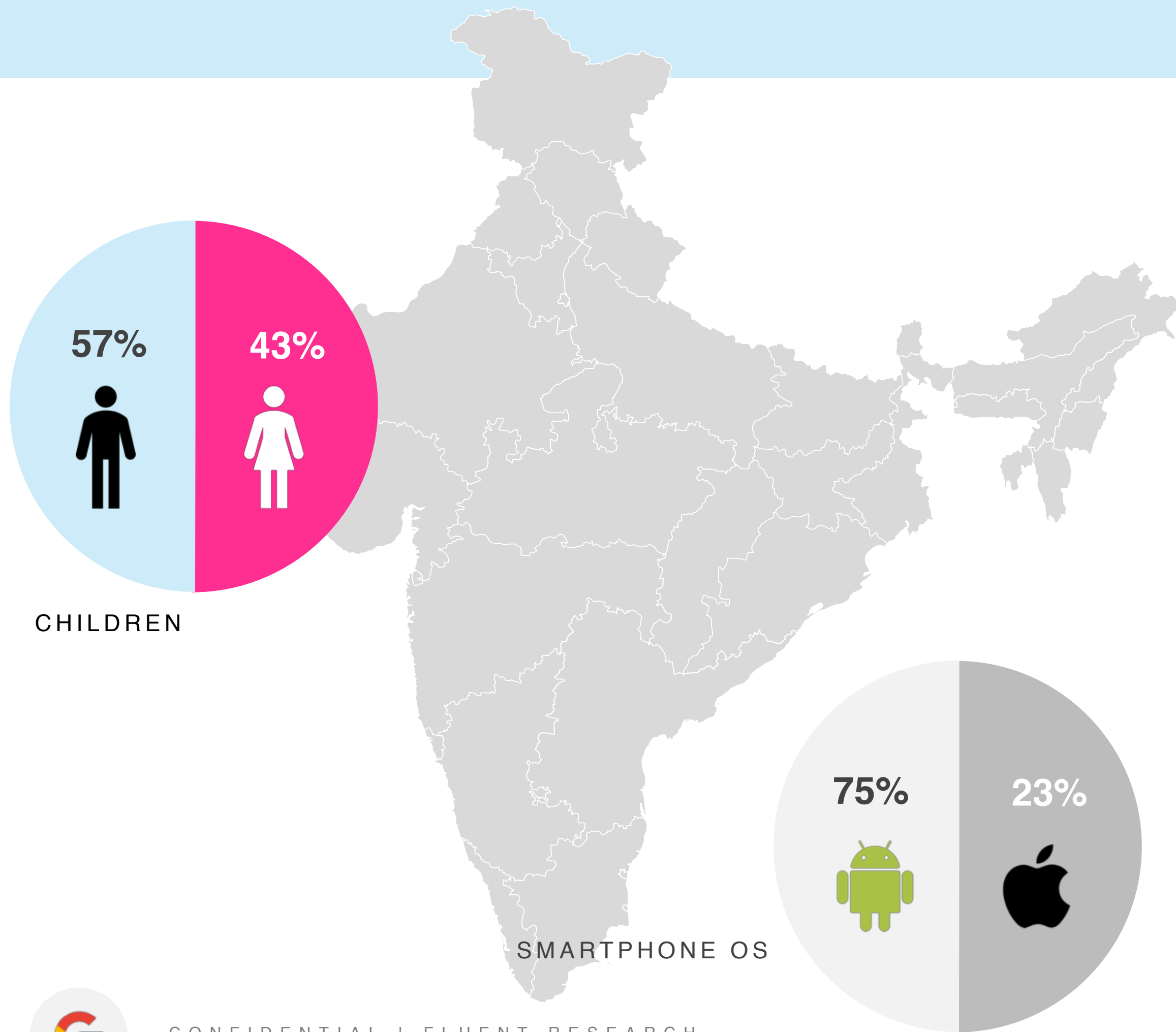
	Total	Strivers	Well-Adapted	Unhappy Campers	Coasters
N	1000	525	183	159	132
Size of segment	NA	53%	18%	16%	13%
Age of Parent: <40 years	61%	68%	58%	64%	41%
Age of Parent: 40+ years	38%	33%	42%	36%	58%
Gender of Parent: Male	60%	59%	63%	58%	61%
Gender of Parent: Female	40%	41%	37%	42%	39%
Age of Child: 2 – 5 years	25%	25%	23%	30%	23%
Age of Child: 6 – 12 years	25%	26%	27%	21%	21%
Age of Child: 13 – 18 years	50%	49%	49%	49%	55%
Gender of Child: Male	57%	57%	54%	58%	59%
Gender of Child: Female	43%	43%	46%	42%	41%
Total Number of Children in HH: One	46%	43%	47%	50%	48%
Total Number of Children in HH: Two ore more	55%	58%	53%	50%	53%
Marital Status: Married/Living with Partner	95%	96%	93%	90%	98%
Marital Status: Other	5%	4%	7%	10%	2%
Parent Education: College degree or more	91%	91%	94%	84%	92%
Urban	89%	92%	87%	89%	82%
Suburban/Rural	11%	9%	12%	11%	18%
Smartphone OS: Android	75%	75%	79%	69%	76%
Smartphone OS: iOS	23%	24%	18%	25%	20%
Region: Delhi	27%	31%	25%	19%	22%
Region: Mumbai	21%	21%	21%	19%	19%
Region: Bangalore	12%	11%	13%	16%	9%
Region: Chennai	12%	12%	14%	11%	7%
Region: Other	29%	25%	27%	34%	43%

OVERVIEW

Indian parents are proponents of digital technology's positive potential and use it frequently in their family life. They also report higher levels of technology stress and family stress. However, they also report higher than average levels of family wellbeing. Strivers predominate in this population, with more than half of Indian families categorized in this persona, the highest among the countries surveyed. Coasters are the smallest segment in India, and India has the smallest proportion of Coasters compared to the other countries surveyed.

TECHNOLOGY OUTLOOK

	Low	Medium	High
Technology Benefits	12%	23%	65%
Technology Stress	23%	27%	50%

Low Medium High

PERSONAS

53% Strivers
18% Well-Adapted
16% Unhappy Campers
13% Coasters

Strivers Well-Adapted Unhappy Campers Coasters
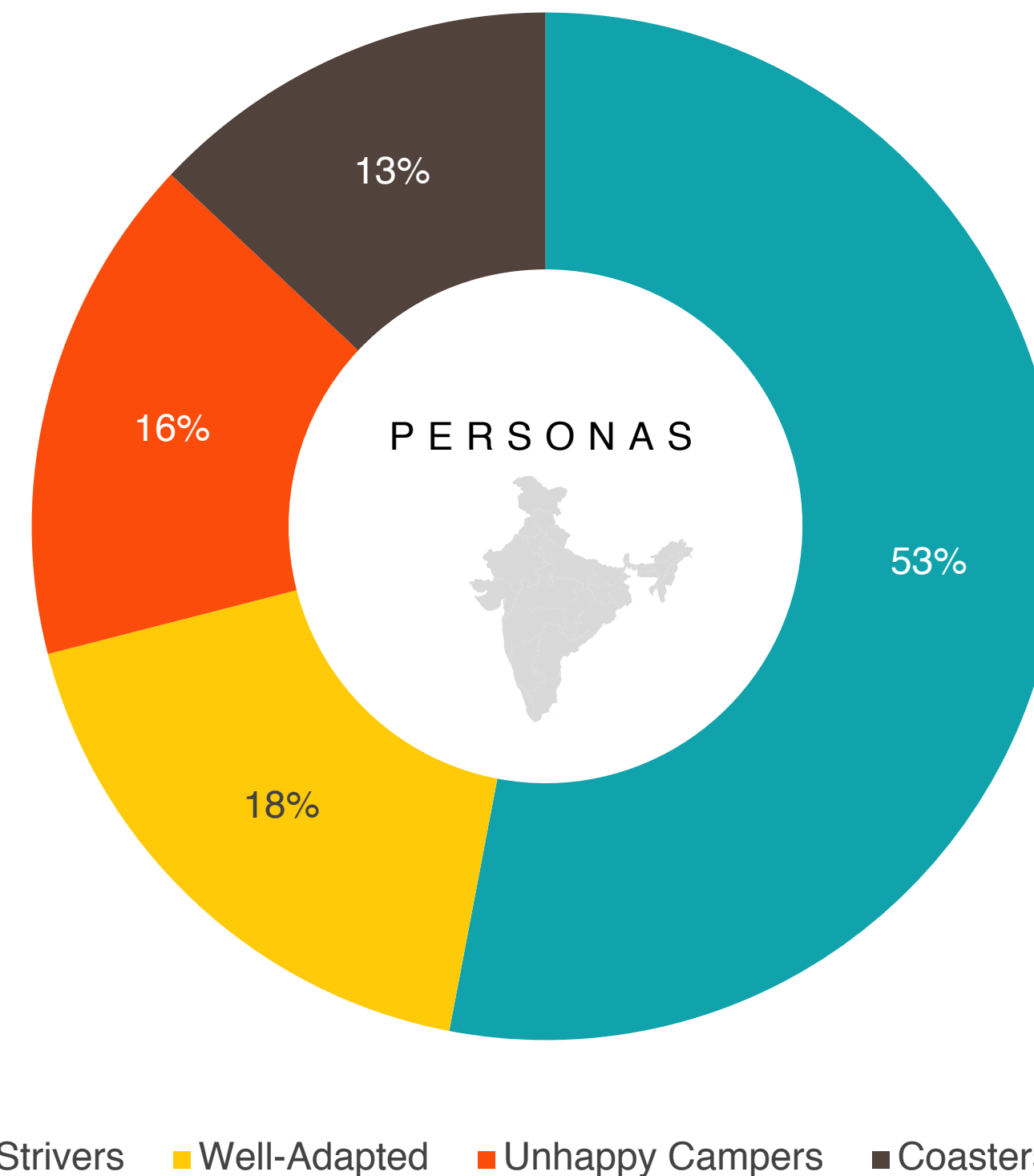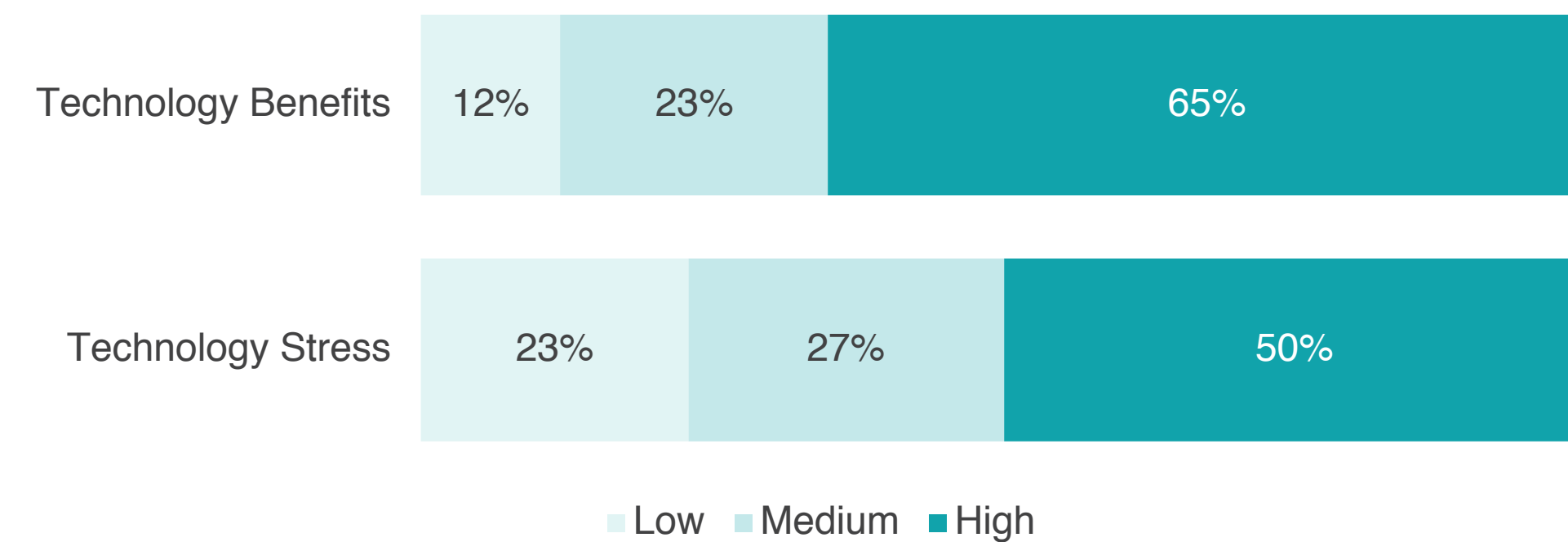
Indian parents report high levels of both family wellbeing and family stress. They are busy parents, reporting more frequent activities with their child compared to the global average. They are more likely to describe their family as happy and to be highly satisfied with spending time with their family. Indian parents indicate the highest level of satisfaction with their financial security and health (physical fitness and healthy diet).

Indian parents are highly optimistic about their child's future, but are also highly concerned with their child's academic performance (72% vs 39% global average) and emotional wellbeing (69% vs 39% global average). This could be causing the higher than average levels of family stress that they report, including feeling stressed out, always rushed for time and isolated and disconnected from each other.

Demographic trends: Lower income parents in India report lower levels of family wellbeing and less frequent family activities, but also less family stress.

GENERAL PROFILE

Indian parents report high levels of both family wellbeing and family stress. While they have the highest level of concern among all countries about their child's academic performance and emotional wellbeing, their worries about their child's safety are on par with the global average.

FAMILY WELLBEING

Family is described completely/very well as happy, 66%▲
Very/extremely satisfied with:
* Being safe, 54%▲
* Being financially secure, 49%▲
* Spending time with family, 63%▲
* Being role model to child, 56%▲

FAMILY STRESS

Family is described completely/very well as:
* Stressed-out, 33%▲
* Always rushed for time, 34%▲
* Isolated or disconnected from each other, 26%▲
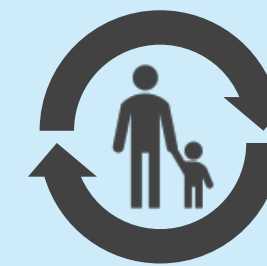
PARENTAL ENGAGEMENT

Do activities with child daily:
* Do homework, 54%▲
* Eat dinner, 67%◉
* Learn and study new things, 43%▲
* Spend unplugged time, 37%◉
Child shares what's going on in life, 87%◉
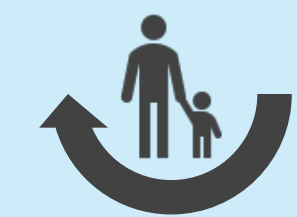
PARENTAL CONCERNS

Optimistic about child's future, 84%◉
Very/extremely concerned about:
* Child's academic performance, 72%▲
* Child's emotional wellbeing, 69%▲
Worry frequently about child's safety, 67%◉

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

Families in India describe a high level of digital tech usage compared to the global average. Indian parents use digital tech to meet a range of parental and family needs and believe in the positive impact that digital tech contribute to these areas, including their child's intellectual development, emotional wellbeing and social life. While they believe digital tech usage is productive, they do express concern that it is often a waste of time and worry about digital addiction for their children and themselves, and their levels of tech stress are greater than the global average. Indian parents use digital tech as a parenting tool, including to ensure safety. They believe it's important to use tech to keep track of their child's location: India is the country where parents most frequently use digital tech to keep track of their child's whereabouts.

Safety vs. Danger: Believe digital tech has positive effect on keeping family safe and have used geolocation to keep track of where their child is.

Productivity vs. Waste: Believe digital tech is a productive use of their time, yet worry about digital addiction for themselves and their child at levels greater than the global averages.

Healthy Development vs. Developmental Harm: Believe digital tech has a positive effect on their child's intellectual development, emotional wellbeing and social life.

Connection vs. Isolation: Frequently use digital tech to spend more time together as a family and to mitigate stress.

Demographic trends: Lower income families in India report lower levels of tech usage, along with less tech stress and benefits of tech.

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

TECHNOLOGY PROFILE

Parents in India report a high level of tech usage for a range of parenting and personal activities and they believe in digital tech's capacity to have a positive impact on their family's lives. However, they also report tech as a source of family tension and arguments at higher than average levels.

SAFETY

- Digital tech has positive effect on keeping family safe, 83%▲
- Tech helps often to keep child safe, 57%▲
- Use tech to stay in touch with family daily, 53%▲
- Use geolocation to keep track of child, 87%▲
- Worry often about inappropriate content on digital tech, 45%◉

DEVELOPMENT

Digital tech has positive effect on child's:
- Intellectual development, 85%▲
- Social life, 79%▲
- Emotional wellbeing, 77%▲

Tech often helps child:
- Gain knowledge and skill, 70%▲
- Succeed in school, 69%▲
- Become more independent, 63%▲
- Make or strengthen friendships, 60%▲

PRODUCTIVITY

Use of tech is often a productive use of my time, parents: 65%▲, teens: 69%▲
Use of tech is often a productive use of child's time, 59%▲
Use tech weekly:
- For family scheduling (71%▲) and planning events, 54%▲
- To shop online, 68%▲
- For information on child's school, 75%▲
- To learn new skills, 79%▲

Worry often about child's (47%▲) and own digital addiction, 37%▲
Child wastes time using tech, 34%▲
Child often stays up late (37%▲) or skips meals to use tech, 31%▲

CONNECTION

Tech has positive effect on:
- Feeling connected as a family, 86%▲
- Staying in touch with extended family, 90%▲

Use tech often to:
- Spend more time together as a family, 55%▲
- To relax and unwind, 60%▲
- To occupy or pacify child (69%▲) or as a reward, 70%▲

Tech is often a source of tension, 38%▲
Have arguments with child often about use of tech, 32%▲

Despite Indian families' high degree of engagement in digital technology and high levels of technology-related stress, the majority of Indian parents feel that they have a good balance between digitally connected and unplugged times. Indian families use both family rules and parental control apps to manage their child's use of digital technology.

Nevertheless, Indian families feel overwhelmed by the constant changes related to tech, more so than the global average. Most Indian parents are interested in learning more about how to use digital technology to improve their family's wellbeing.

IN SEARCH OF BALANCE

Indian parents feel that their family has a good balance between digital tech usage and staying unplugged. They employ both family rules and parental control apps to guide their children's use of digital technology.

BALANCE

Family often has a good balance between tech and unplugged times, 65%▲
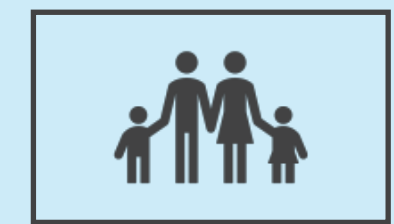
FAMILY RULES

Have rules around digital tech:
- Amount of time child can use tech, 41%◉
- What child can watch, 36%◉
- No devices during dinner, 42%◉
- Use parental control apps to control time on tech (30%▲) or block content, 31%▲
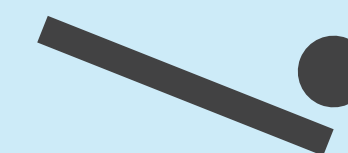
FEELING OVERWHELMED

Feel overwhelmed by constant changes in technology, 84%▲
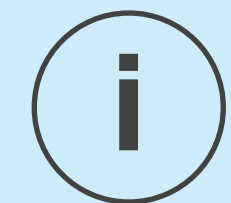
SEEKING HELP

Interested in information on digital wellbeing, 83%▲

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

DIGITAL WELLBEING OF FAMILIES

INDONESIA

INDONESIA SAMPLE

50% / 50%

CHILDREN

77% / 16%

SMARTPHONE OS
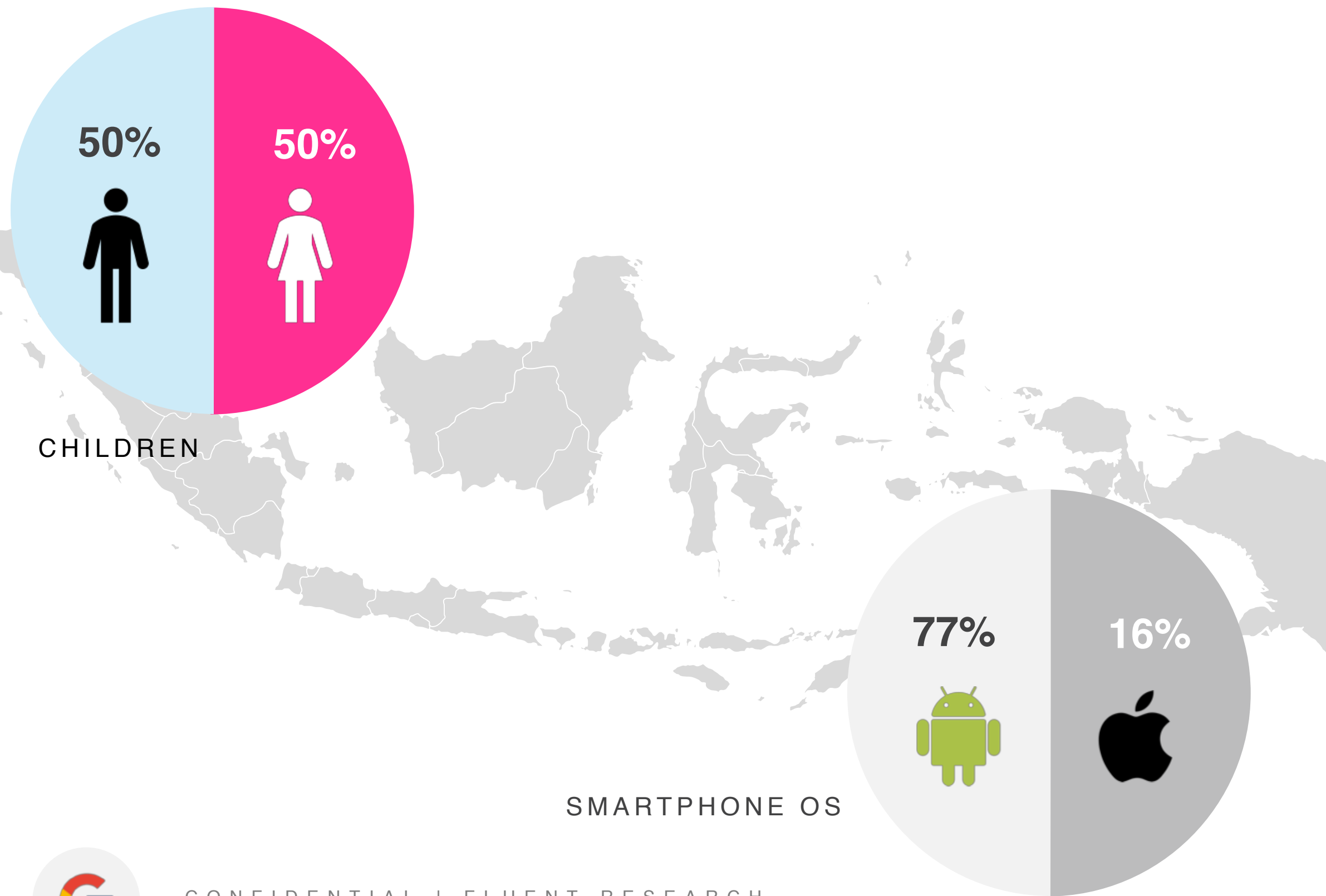
	Total	Strivers	Well-Adapted	Unhappy Campers	Coasters
N	1018	329	258	209	217
Size of segment	NA	32%	25%	21%	21%
Age of Parent: <40 years	59%	62%	58%	58%	58%
Age of Parent: 40+ years	40%	38%	42%	42%	41%
Gender of Parent: Male	56%	58%	57%	52%	55%
Gender of Parent: Female	44%	42%	43%	48%	45%
Age of Child: 2 – 5 years	25%	18%	25%	23%	38%
Age of Child: 6 – 12 years	25%	28%	26%	25%	19%
Age of Child: 13 – 18 years	50%	53%	48%	52%	43%
Gender of Child: Male	50%	53%	48%	56%	44%
Gender of Child: Female	50%	47%	52%	44%	56%
Total Number of Children in HH: One	42%	42%	37%	45%	44%
Total Number of Children in HH: Two ore more	57%	59%	64%	55%	56%
Marital Status: Married/Living with Partner	87%	88%	89%	82%	85%
Marital Status: Other	14%	11%	10%	18%	15%
Parent Education: College degree or more	68%	69%	68%	67%	67%
Urban	74%	77%	72%	73%	72%
Suburban/Rural	26%	23%	28%	27%	27%
Smartphone OS: Android	77%	78%	81%	75%	72%
Smartphone OS: iOS	16%	16%	15%	18%	17%
Region: Java	77%	77%	78%	76%	78%
Region: Sumatra	12%	12%	9%	15%	12%
Region: Other	11%	12%	13%	10%	10%

OVERVIEW

Indonesia has the most diverse representation of personas among all the countries surveyed; no single tech persona predominates. Indonesian families do have the highest proportion of Well-Adapted compared to other countries profiled. Indonesian parents and children are frequent users of digital technology and believe in its ability to have a positive impact on many aspects of their lives. Yet, overall, they display average or lower levels of tech stress, family wellbeing and family stress.

TECHNOLOGY OUTLOOK

	Low	Medium	High
Technology Benefits	18%	27%	55%
Technology Stress	33%	38%	29%

Legend: ■ Low ■ Medium ■ High

PERSONAS

- Strivers: 32%
- Well-Adapted: 25%
- Unhappy Campers: 21%
- Coasters: 21%
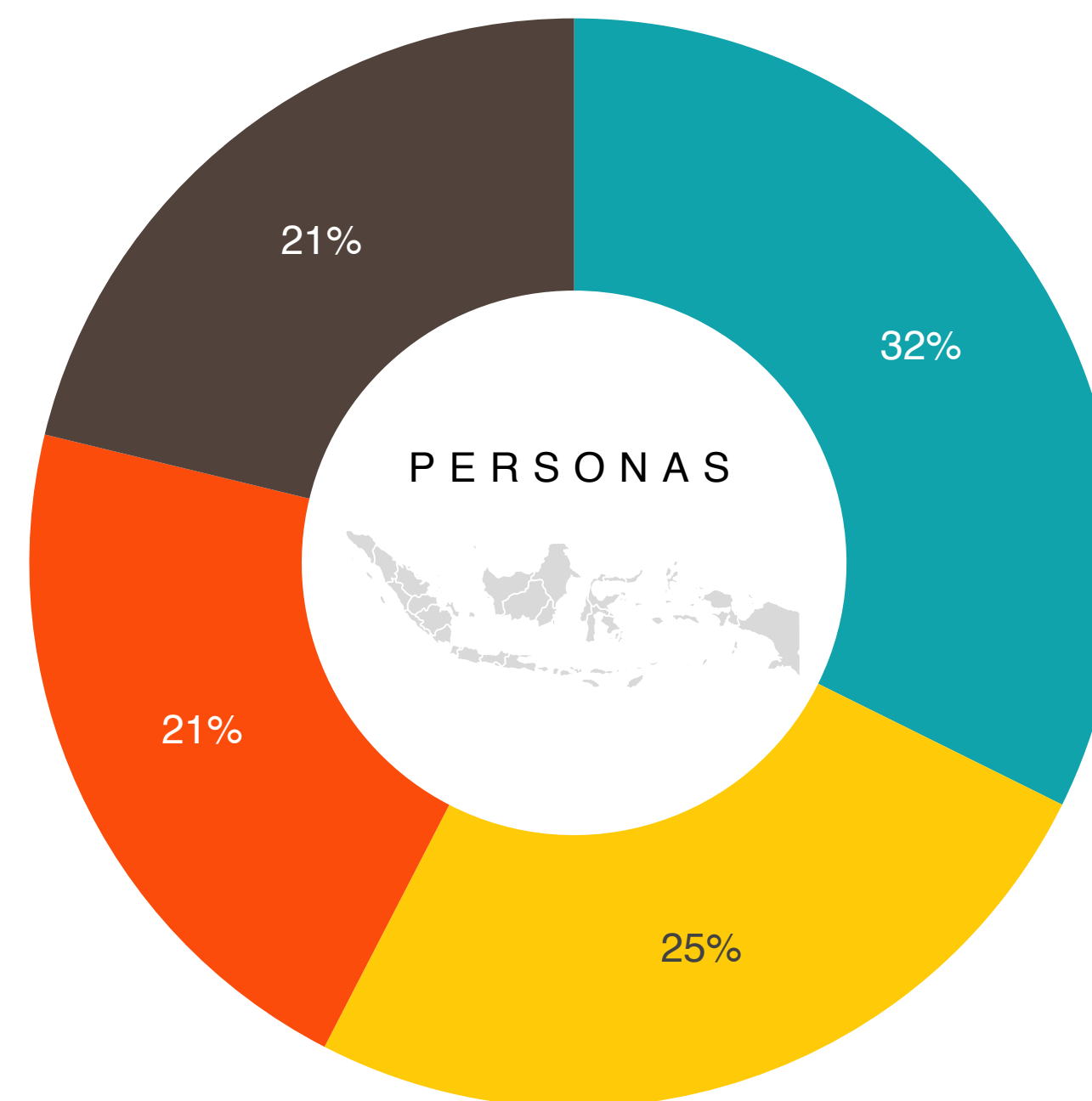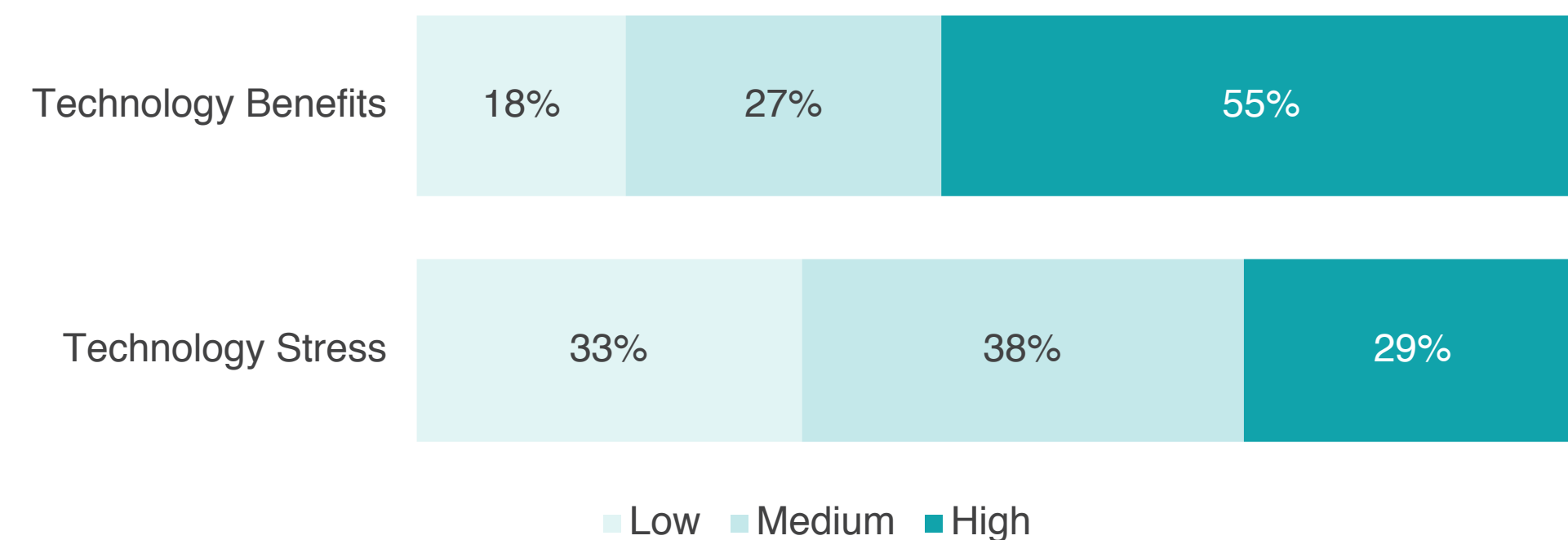
Legend: ■ Strivers ■ Well-Adapted ■ Unhappy Campers ■ Coasters

Indonesian parents report average levels of family wellbeing and lower levels of family stress when compared to the other countries surveyed. The majority are happy and highly satisfied with the time they spend with their family, and few describe themselves as always rushed for time or stressed out. They express less concern about their child's academic performance or emotional wellbeing. Indonesian parents' participation in most activities with their children is comparable to other countries. One activity that Indonesian parents participate in more frequently than the global average is playing sports with their child.

Demographic trends: Lower income parents in Indonesia report lower levels of family wellbeing and less frequent family activities. However, tech stress does not have a linear relationship with income level.

GENERAL PROFILE

Indonesian parents report lower levels of family stress and average levels of family wellbeing and parental engagement.

FAMILY WELLBEING

Family is described completely/very well as happy, 57%◉
Very/extremely satisfied with:
- Being safe, 40%◉
- Being financially secure, 32%◉
- Spending time with family, 54%◉
- Being role model to child, 46%◉
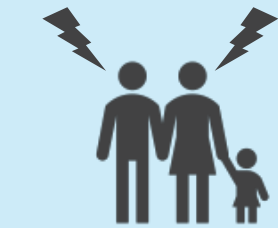
FAMILY STRESS

Family is described completely/very well as:
- Stressed-out, 7%▼
- Always rushed for time, 10%▼
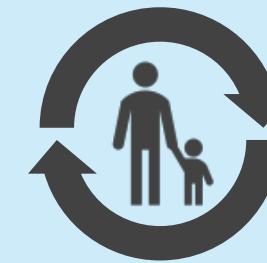
PARENTAL ENGAGEMENT

Do activities with child daily:
- Do homework, 42%◉
- Eat dinner, 66%◉
- Spend unplugged time, 33%◉
Play sports with child weekly, 69%▲
Child shares what is going on in life, 80%◉
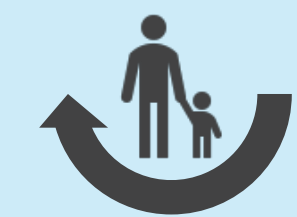
PARENTAL CONCERNS

Optimistic about child's future, 86%◉
Very/extremely concerned about:
- Child's academic performance, 20%▼
- Child's emotional wellbeing, 23%▼
Worry frequently about child's safety, 69%◉

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

TECHNOLOGY PROFILE

Indonesian parents report a high level of tech usage for a range of parenting activities and they believe in digital tech's capacity to have a positive impact on their family's lives. They exhibit less concern than parents in other countries that digital tech is a waste of time for their child.

Parents in Indonesia describe a high level of digital tech usage for themselves and their children compared to the global average. Indonesian parents use digital tech to meet a range of family needs and believe in the positive impact that digital tech contribute to these areas, including their child's intellectual development, emotional wellbeing and social life. They believe digital tech usage is productive for their child and are less likely to report it as a waste of their child's time or that their child stays up late to use digital tech. Indonesian parents use digital tech to keep track of their children and believe it frequently helps their child stay safe.

Safety vs. Danger: Believe digital tech has positive effect on keeping family safe and have used geolocation to keep track of where their child is.

Productivity vs. Waste: Believe digital tech is a productive use of their time. Many believe digital tech is a productive use of their child' time and they are less likely to report digital tech as a distraction for their child.

Healthy Development vs. Developmental Harm: Believe digital tech has a positive effect on their child's intellectual development, emotional wellbeing and social life.

Connection vs. Isolation: Frequently use digital tech to spend more time together as a family and to mitigate stress.

Demographic trends: Lower income families in Indonesia report lower levels of tech usage and belief in the benefits of tech. Experiences of tech stress do not differ by income level.

▲ Over-index (>120) compared to global average
◎ Global average
▼ Under-index (<80) compared to global average

SAFETY

- Digital tech has positive effect on keeping family safe, 76%▲
- Tech helps often to keep child safe, 45%▲
- Use tech to stay in touch with family daily, 66%▲
- Use geolocation to keep track of child, 81%▲
- Worry often about inappropriate content on digital tech, 48%◎

DEVELOPMENT

Digital tech has positive effect on child's:
- Intellectual development, 85%▲
- Social life, 72%▲
- Emotional wellbeing, 67%▲

Tech often helps child:
- Gain knowledge and skill, 68%▲
- Succeed in school, 64%▲
- Become more independent, 48%▲
- Make or strengthen friendships, 56%▲

PRODUCTIVITY

Use of tech is often a productive use of my time, parents: 53%▲, teens: 56%▲
Use of tech is often a productive use of child's time, 45%▲
Use tech weekly:
- For family scheduling (56%◎) and planning events, 33%◎
- To shop online, 49%◎
- For information on child's school, 72%▲
- To learn new skills, 71%▲

Worry often about child's (45%◎) and own digital addiction, 37%▲
Child often wastes time using tech, 18%▼
Child often stays up late (16%▼) or skips meals to use tech, 14%◎

CONNECTION

Tech has positive effect on:
- Feeling connected as a family, 84%▲
- Balancing alone and together time, 71%▲
- Spending IRL together, 66%▲
- Staying in touch with extended family, 88%◎

Use tech often to:
- Spend more time together as a family, 45%▲
- Relax and unwind, 57%▲
- Occupy or pacify child (60%◎) or as a reward, 37%▼

Tech is often a source of tension, 18%◎

Despite Indonesian families' high degree of engagement in digital technology in their families lives, the majority feel that they have a good balance between digitally connected and unplugged times. Most are also interested in learning more about how to use digital tech to improve their family's wellbeing. While the majority feel overwhelmed by the constant changes related to tech, this level is on par with the global average.

Indonesian parents believe it is important for their children to have strict rules and boundaries, and this extends to their parenting approach for tech. Indonesian families use both family rules and parental control apps to manage their child's use of digital tech. Use of apps/software to block content and having family rules about what content their child can watch on their digital tech are more prevalent than the global average.

Lower income families are less likely to feel their family has a good balance in their tech usage and are also less likely to be interested in more information on how to use digital tech to improve their family's wellbeing.

IN SEARCH OF BALANCE

Indonesian parents feel that their family has a good balance between their digital tech usage and staying unplugged. They employ both family rules and use of parental control apps to guide their children's use of digital tech, particularly related to managing content.
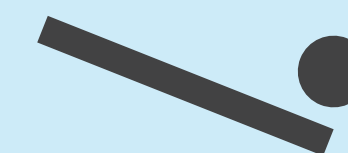
BALANCE

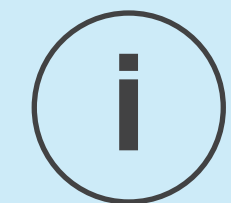Family often has a good balance between tech and unplugged times, 63%▲
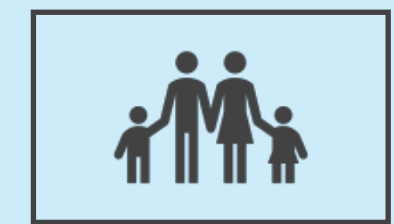
FAMILY RULES

Have rules around digital tech:
- Amount of time child can use tech, 51%▲
- What child can watch, 59%▲
- No devices during dinner, 46%◉
- Use parental control apps to control time on tech (23%▲) or block content, 39%▲

FEELING OVERWHELMED

Feel overwhelmed by constant changes in technology, 62%◉

SEEKING HELP
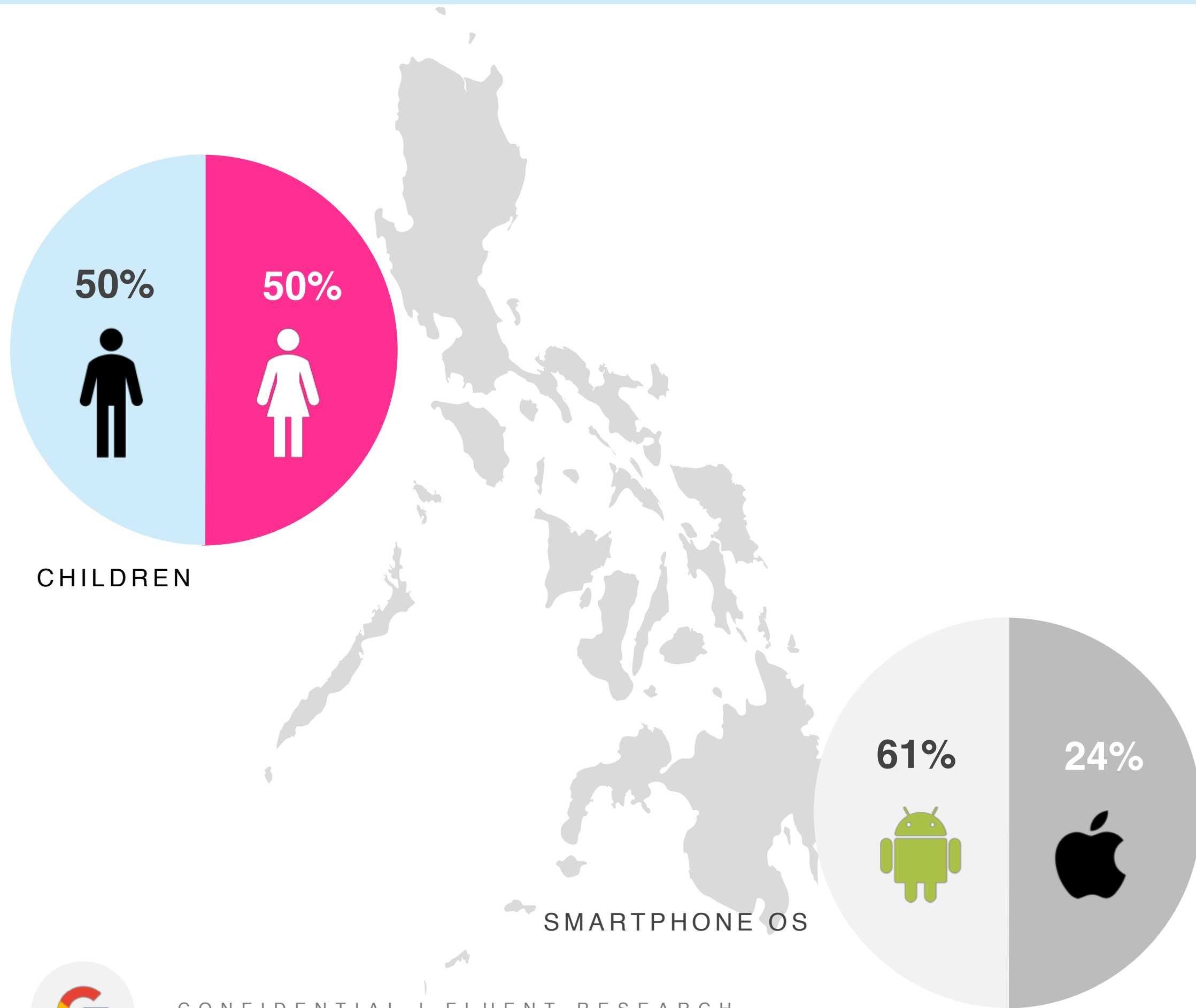
Interested in information on digital wellbeing, 78%▲

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

DIGITAL WELLBEING OF FAMILIES

PHILIPPINES

PHILLIPINES SAMPLE

50% / **50%**

CHILDREN

61% / **24%**

SMARTPHONE OS

	Total	Strivers	Well-Adapted	Unhappy Campers	Coasters
N	1012	429	166	167	249
Size of segment	NA	42%	16%	17%	25%
Age of Parent: <40 years	68%	70%	60%	72%	66%
Age of Parent: 40+ years	32%	30%	40%	27%	34%
Gender of Parent: Male	40%	41%	46%	33%	36%
Gender of Parent: Female	60%	59%	54%	67%	64%
Age of Child: 2 – 5 years	25%	20%	23%	25%	35%
Age of Child: 6 – 12 years	25%	22%	30%	29%	26%
Age of Child: 13 – 18 years	50%	58%	47%	46%	39%
Gender of Child: Male	50%	50%	46%	53%	49%
Gender of Child: Female	50%	50%	54%	47%	51%
Total Number of Children in HH: One	34%	38%	27%	34%	32%
Total Number of Children in HH: Two ore more	66%	62%	73%	66%	68%
Marital Status: Married/Living with Partner	73%	72%	74%	69%	76%
Marital Status: Other	27%	28%	26%	31%	24%
Parent Education: College degree or more	65%	67%	70%	62%	63%
Urban	74%	75%	72%	74%	75%
Suburban/Rural	26%	25%	25%	27%	26%
Smartphone OS: Android	61%	62%	65%	61%	59%
Smartphone OS: iOS	24%	25%	24%	24%	24%
Region: Luzon	71%	71%	75%	67%	73%
Region: Mindanao	11%	12%	12%	11%	8%
Region: Visayas	18%	18%	13%	22%	18%

OVERVIEW

Families in the Philippines have high levels of tech usage. They believe in the positive effect of digital tech on their lives, but also experience tech-related stress. They report high levels of family wellbeing and average levels of family stress. Filipino parents are characterized by the Striver persona, which represents the largest segment among families.

TECHNOLOGY OUTLOOK

	Low	Medium	High
Technology Benefits	12%	31%	57%
Technology Stress	28%	38%	35%

■ Low ■ Medium ■ High

PERSONAS

25%
42%
17%
16%

■ Strivers ■ Well-Adapted ■ Unhappy Campers ■ Coasters
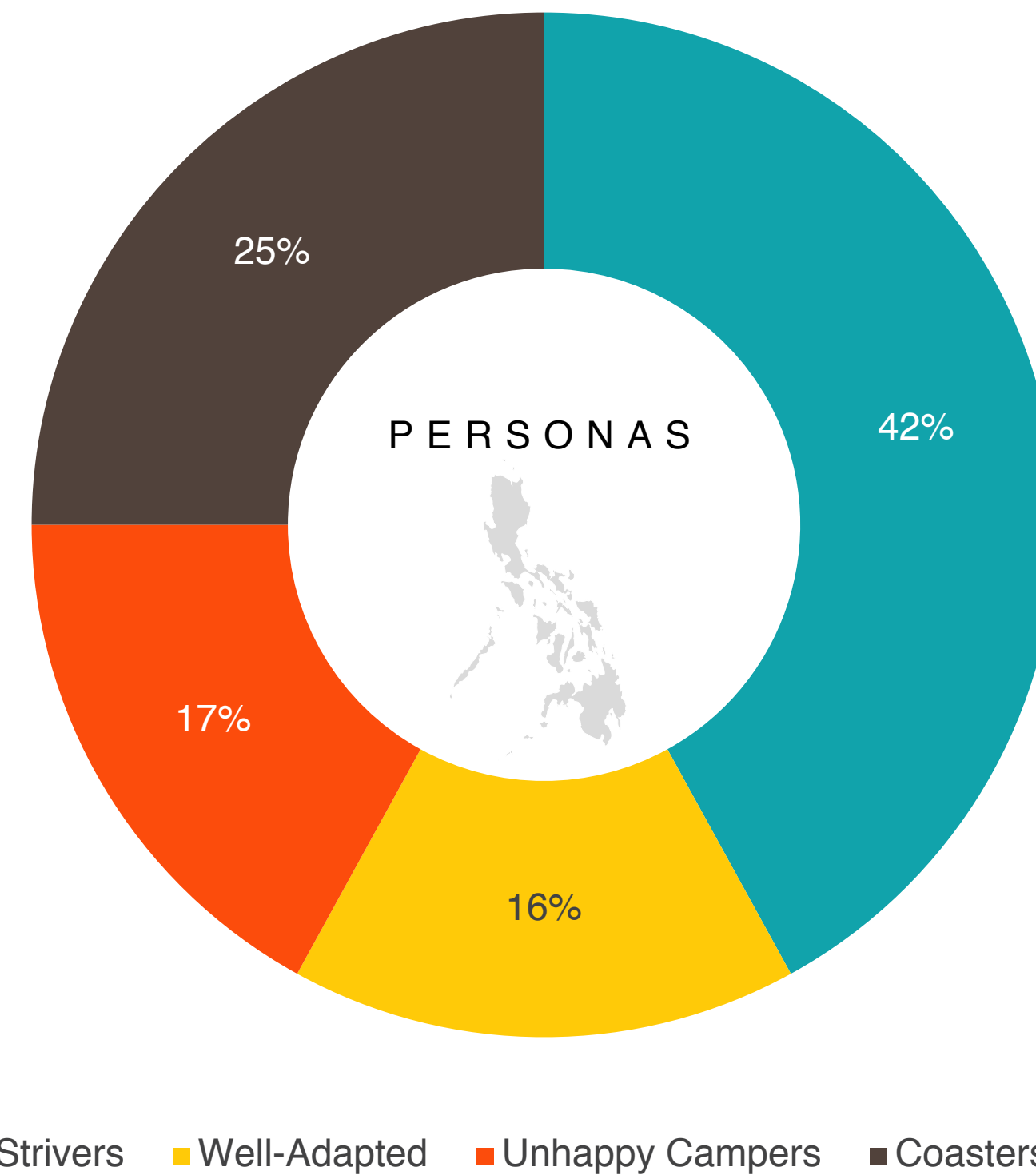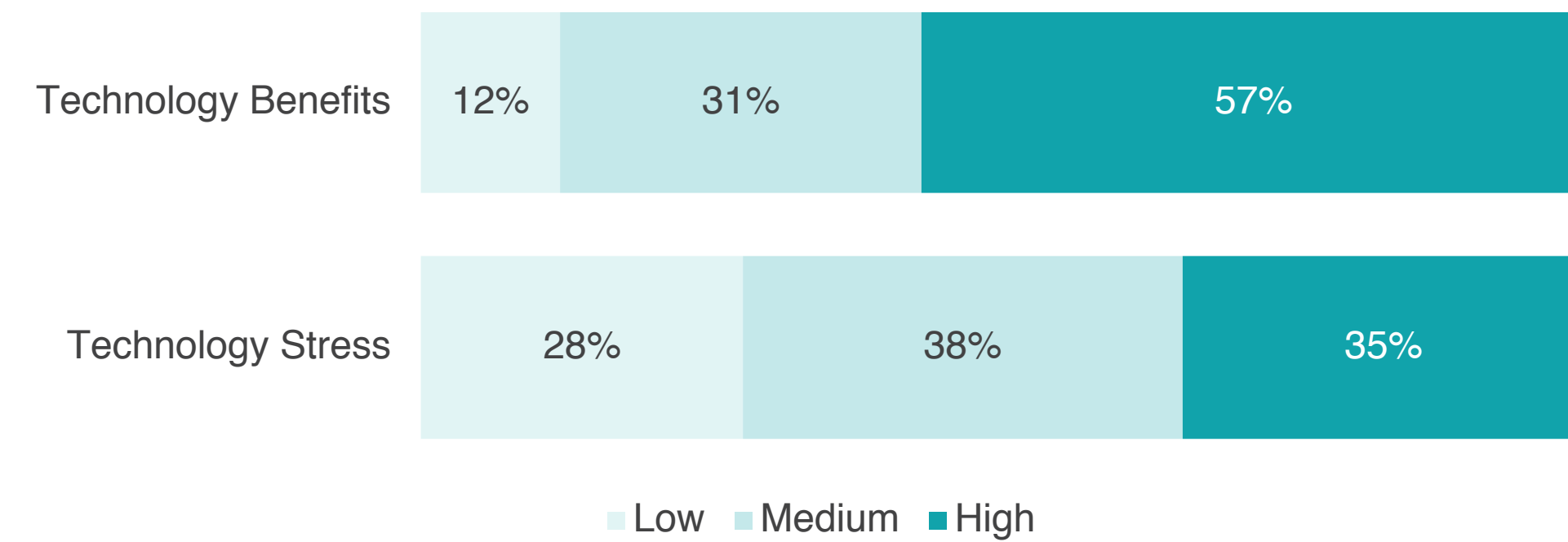
Families in the Philippines report high levels of family wellbeing and average levels of family stress when compared to the other countries surveyed. The majority describe their family as happy, and they report higher levels of satisfaction with the time they spend with their family than do parents in other countries. They describe themselves as always rushed for time or stressed out at levels comparable to the global average. They express more concerns about their child's emotional wellbeing and academic achievement. Filipino parents more frequently participate in activities with their children, such as eating dinner at home and doing homework, than parents in other countries.

Demographic trends: Lower income families in the Philippines report more family activities, as well as higher levels of family stress. Interestingly, middle income families have lower family wellbeing than lower- or higher-income families.

GENERAL PROFILE

Filipino parents report average levels of family stress and higher levels of family wellbeing and parental engagement.

FAMILY WELLBEING

Family is described completely/very well as happy, 66%▲
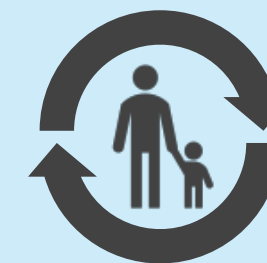Very/extremely satisfied with:
- Being safe, 50%▲
- Spending time with family, 65%▲
- Being role model to child, 55%▲

FAMILY STRESS

Family is described completely/very well as:
- Stressed-out, 16%◉
- Always rushed for time, 16%◉

PARENTAL ENGAGEMENT

Do activities with child daily:
- Homework, 52%▲
- Eat dinner, 80%▲
- Spend unplugged time, 39%◉
- Learn and study new things, 47%▲
Child shares what's going on in life, 85%◉
It's important that child has strict rules, 84%▲

PARENTAL CONCERNS

Optimistic about child's future, 86%◉
Very/extremely concerned about:
- Child's academic performance, 68%▲
- Child's emotional wellbeing, 68%▲
Worry frequently about child's safety, 70%◉

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

Parents in the Philippines describe a high level of digital tech usage for themselves and their children compared to the global average. They report the highest level of daily contact with their family using digital tech among the countries surveyed. Filipino parents use digital tech to meet a range of family needs and believe in the positive impact that digital tech contribute to these areas, including their child's intellectual development, emotional wellbeing and social life. They also believe digital tech has a positive effect on families spending "in real life" time together. However, they hold more tempered views on the productive and distracting potentials of digital tech, with levels on par with the global average. Filipino parents believe it is important to use tech to keep track of their child's location and use digital tech for this purpose.

Safety vs. Danger: Believe digital tech has positive effect on keeping family safe and have used geolocation to keep track of where their child is.

Productivity vs. Waste: Use digital tech for family scheduling, information about child's school and for learning new skills at higher than average rates. Concerns about distracting properties of digital tech are on par with global averages.

Healthy Development vs. Developmental Harm: Believe digital tech has a positive effect on their child's intellectual development, emotional wellbeing and social life.

Connection vs. Isolation: Believe digital tech has a positive effect on feeling connected as a family and on spending IRL time together.

Demographic trends: Lower income families in the Philippines report higher levels of tech stress.

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

TECHNOLOGY PROFILE

Parents in the Philippines report a high level of tech usage for a range of parenting activities. they believe in digital tech's capacity to have a positive impact on their children's lives. Their reports of family arguments about tech and concerns about addiction to digital tech are on par with global averages.

SAFETY

- Digital tech has positive effect on keeping family safe, 82%▲
- Tech helps often to keep child safe, 38%◉
- Use tech to stay in touch with child daily, 71%▲
- Use geolocation to keep track of child, 74%◉
- Worry often about inappropriate content on digital tech, 52%◉

DEVELOPMENT

Digital tech has positive effect on child's:
- Intellectual development, 89%▲
- Social life, 78%▲
- Emotional wellbeing, 75%▲

Tech often helps child:
- Gain knowledge and skill, 64%▲
- Succeed in school, 61%▲
- Become more independent, 41%◉
- Make or strengthen friendships, 44%◉

PRODUCTIVITY

Use of tech is often a productive use of my time, parents: 49%◉, teens: 55%◉
Use of tech is often a productive use of child's time, 41%◉
Use tech weekly:
- For family scheduling (61%▲) and planning events, 40%◉
- To shop online, 53%◉
- For information on child's school, 68%▲
- To learn new skills, 80%▲

Worry often about child's (43%◉) and own digital addiction, 28%◉
Child often wastes time using tech, 26%◉
Child often stays up late (25%◉) or skips meals to use tech, 14%◉

CONNECTION

Tech has positive effect on:
- Feeling connected as a family, 89%▲
- Balancing alone and together time, 79%▲
- Spending IRL together, 73%▲
- Staying in touch with extended family, 94%◉

Use tech often to:
- Spend more time together as a family, 34%◉
- Relax and unwind, 51%◉
- Occupy or pacify child (63%▲) or as a reward, 56%▲

Tech is often a source of tension, 18%◉

IN SEARCH OF BALANCE

Although Filipino families have a high level of engagement in digital technology, the majority of parents feel that they have a good balance of digitally connected vs. unplugged time. However, most feel overwhelmed by the constant changes and developments with digital technology, more so than the global average. Most are also interested in learning more about how to use digital tech to improve their family's wellbeing.

Most Filipino parents believe it is important for their children to have strict rules and boundaries and this extends to their parenting approach for tech. Families in the Philippines use both family rules and parental control apps to manage their child's use of digital tech. Use of parental apps to monitor time spent on devices or to block content is more prevalent than the global average.

Middle income families are less likely than lower or higher income families to feel that their family has a good balance in their tech usage. However, Filipino families across income levels hold similar interest levels in learning more about how to use digital tech to improve their family's wellbeing.
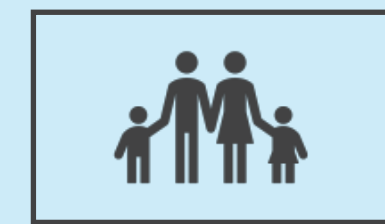
Filipino parents feel that their family has a good balance between their digital tech usage and staying unplugged. They use parental control apps to guide their children's use of digital tech, as well as family rules, such as no devices during dinner.
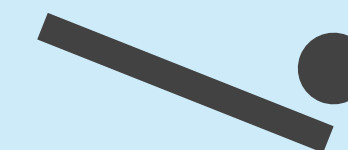
BALANCE

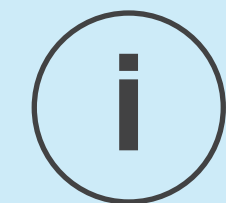Family often has a good balance between tech and unplugged times, 59%◉

FAMILY RULES

Have rules around digital tech:
- Amount of time child can use tech, 62%▲
- What child can watch, 57%▲
- No devices during dinner, 57%▲
- Use parental control apps to control time on tech (21%▲) or block content, 33%▲

FEELING OVERWHELMED

Feel overwhelmed by constant changes in technology, 85%▲

SEEKING HELP
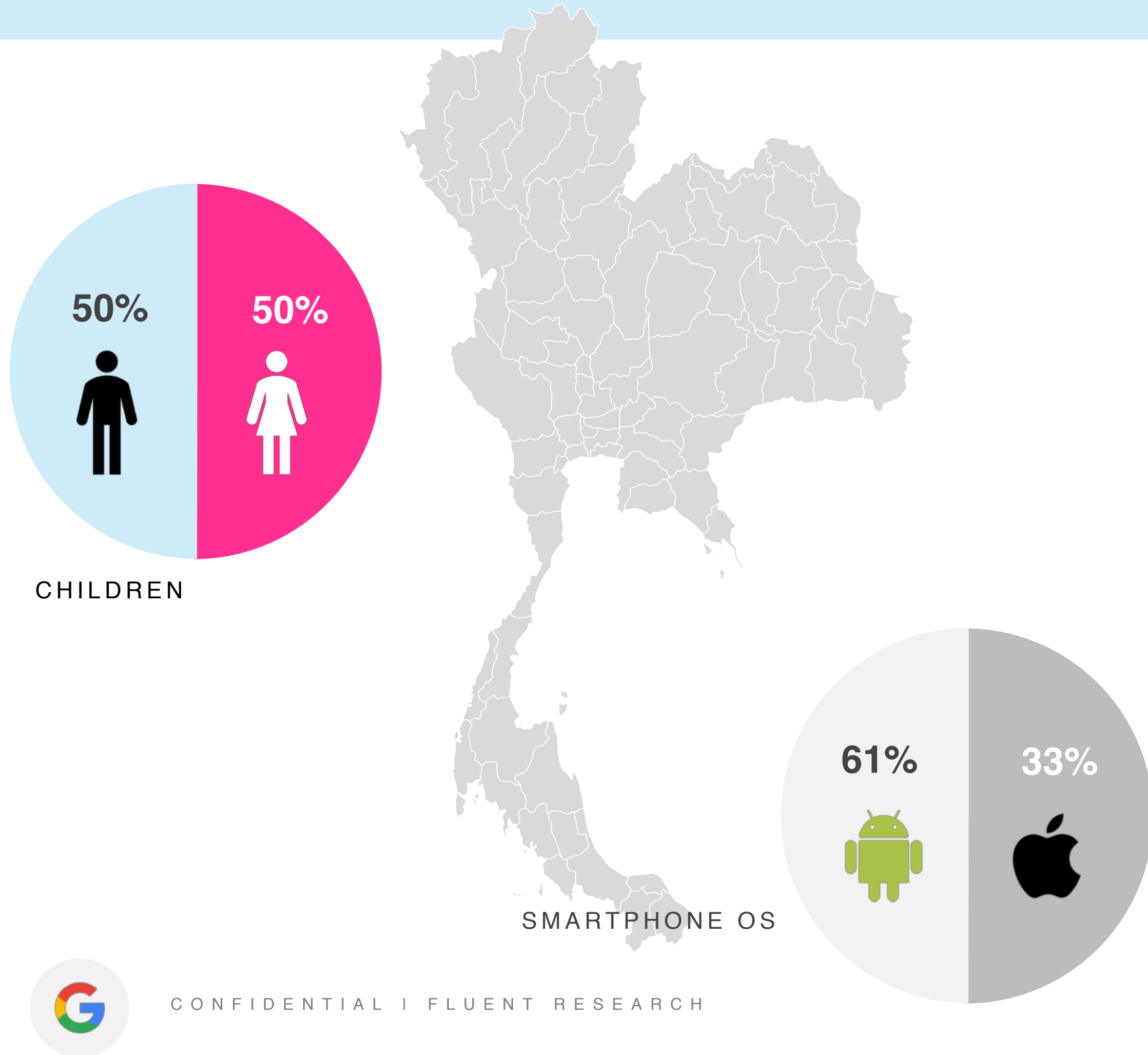
Interested in information on digital wellbeing, 80%▲

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

DIGITAL WELLBEING OF FAMILIES

THAILAND

THAILAND SAMPLE

50% **50%**

CHILDREN

61% **33%**

SMARTPHONE OS

	Total	Strivers	Well-Adapted	Unhappy Campers	Coasters
N	1016	360	71	335	249
Size of segment	NA	35%	7%	33%	25%
Age of Parent: <40 years	60%	63%	65%	59%	57%
Age of Parent: 40+ years	39%	37%	35%	41%	43%
Gender of Parent: Male	43%	42%	34%	47%	43%
Gender of Parent: Female	57%	58%	66%	53%	57%
Age of Child: 2 – 5 years	25%	24%	28%	22%	29%
Age of Child: 6 – 12 years	25%	23%	25%	25%	28%
Age of Child: 13 – 18 years	50%	52%	46%	53%	43%
Gender of Child: Male	50%	53%	38%	53%	47%
Gender of Child: Female	50%	47%	62%	47%	53%
Total Number of Children in HH: One	53%	54%	35%	55%	56%
Total Number of Children in HH: Two ore more	46%	46%	65%	45%	44%
Marital Status: Married/Living with Partner	72%	73%	83%	68%	73%
Marital Status: Other	28%	27%	16%	32%	27%
Parent Education: College degree or more	70%	75%	69%	63%	71%
Urban	75%	81%	80%	68%	75%
Suburban/Rural	25%	20%	19%	32%	26%
Smartphone OS: Android	61%	56%	66%	64%	63%
Smartphone OS: iOS	33%	40%	28%	31%	28%
Region: Central	68%	71%	77%	65%	65%
Region: North	11%	10%	8%	13%	12%
Region: Northeast	11%	10%	10%	14%	10%
Region: South	10%	9%	4%	9%	13%

OVERVIEW

The two dominant personas in Thailand are Strivers and Unhappy Campers, which account for the majority of parents. This profile is reflected in the overall levels of perceived tech benefits, tech stress and tech usage among families in Thailand. Thai parents report high tech usage and tech stress, yet their beliefs in the benefits of tech are not as strong as those of parents in other countries.

TECHNOLOGY OUTLOOK

Technology Benefits	31%	35%	34%
Technology Stress	25%	32%	42%

■ Low ■ Medium ■ High

PERSONAS

35%
25%
33%
7%
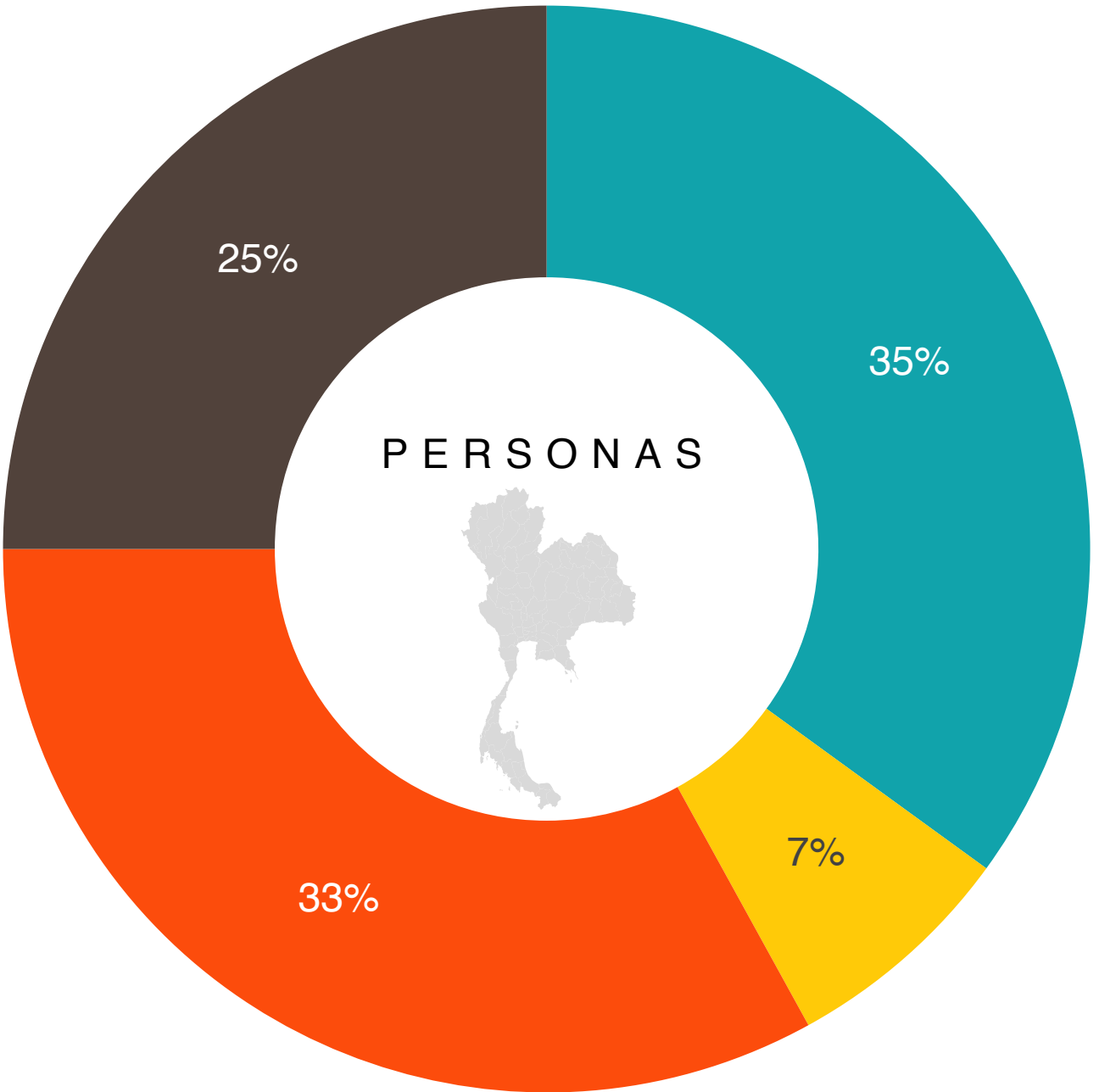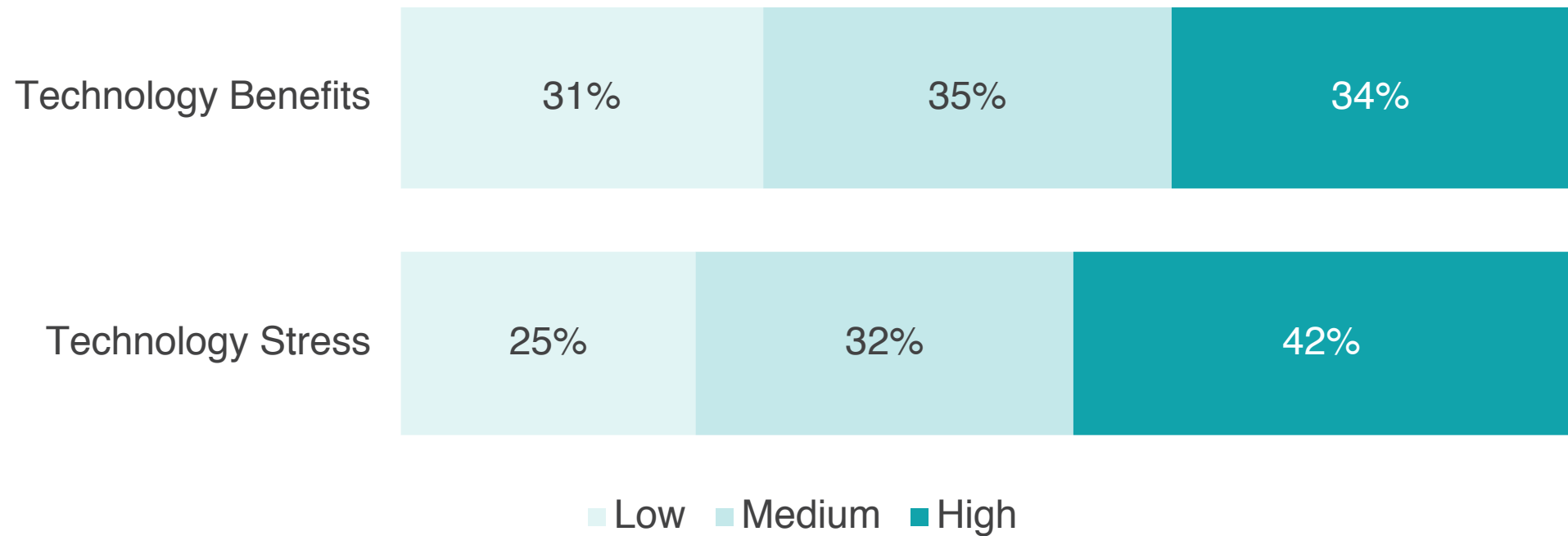
■ Strivers ■ Well-Adapted ■ Unhappy Campers ■ Coasters

Families in Thailand report high levels of family wellbeing and higher levels of family stress. The majority describe their family as happy and they report higher levels of satisfaction with their health, safety, financial security, as well as the time they spend with their family, compared to parents in other countries. Thai parents participate more frequently than the global average in recreational activities with their child, such as listening to music, playing video or online games and playing sports. Their level of worry about their child's safety and wellbeing is in line with the global average, but they express less concern about their child's academic performance or emotional wellbeing than parents in other countries. Thai parents are the most likely of all parents to say that children should do as told.

Demographic trends: Higher income families in Thailand report higher levels of family wellbeing. However, neither family stress nor amount of family activities differ by income level.

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

GENERAL PROFILE

Thai parents report high levels of family wellbeing and stress, as well as high levels of parental engagement – particularly for recreational activities.
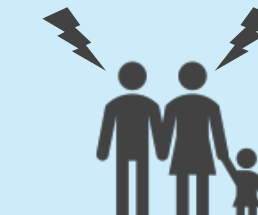
FAMILY WELLBEING

Family is described completely/very well as happy, 54%◉
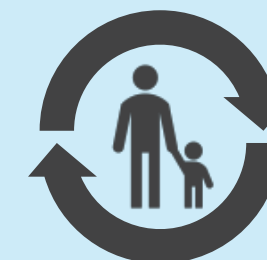Very/extremely satisfied with:
- Being safe, 53%▲
- Being financially secure, 42%▲
- Eating healthy, 47%▲
- Spending time with family, 58%▲
- Being role model to child, 54%▲

FAMILY STRESS

Family is described completely/very well as:
- Stressed-out, 15%◉
- Always rushed for time, 20%◉
- Isolated or disconnected from each other, 13%◉

PARENTAL ENGAGEMENT

Do activities with child daily:
- Homework, 40%◉
- Eat dinner, 58%◉
- Play sports, 24%▲
- Learn and study new things, 34%▲
- Listen to music, 42%▲
- Play video/online games, 31%▲
Children should do what they are told, 87%▲

PARENTAL CONCERNS

Optimistic about child's future, 87%◉
Very/extremely concerned about:
- Child's academic performance, 29%▼
- Child's emotional wellbeing, 29%▼
Worry frequently about child's safety, 78%◉

TECHNOLOGY PROFILE

Parents in Thailand report a high level of tech usage. While they frequently use digital tech for parenting and family activities, they hold only average levels of positive beliefs on the impact of tech on their children's development.

Digital tech use is high among families in Thailand. However, beliefs in the benefits of tech are only moderately positive. Thai parents use digital tech to keep track of information about their child's school and their child's whereabouts at higher rates than parents in other countries. Thai parents also report higher than average levels of tech stress. Thai parents are more likely to report digital tech as a frequent source of tension in their family and that they frequently have arguments with their child about the child's tech use. While reporting higher tech stress, Thai parents also report higher usage of tech to mitigate stress. Parents in Thailand report higher rates of using digital tech to relax and unwind and to spend more time together as a family. They also are more likely to use digital tech to pacify their child or as a reward.

Safety vs. Danger: Believe important to use digital tech to keep track of child and have used geolocation to track their child's location.

Productivity vs. Waste: View digital tech use as both productive and distracting for child.

Healthy Development vs. Developmental Harm: Believe in digital tech's positive effects on child's friendships and becoming independent are above average.

Connection vs. Isolation: Use digital tech to spend more time with family and to reward or pacify child at above average rates.

Demographic trends: Lower income families in Thailand are less likely to believe in the benefits of tech. However, levels of tech stress do not differ by income level.

▲ Over-index (>120) compared to global average
◉ Global average
▼ Under-index (<80) compared to global average

SAFETY

- Digital tech has positive effect on keeping family safe, 64%◉
- Tech helps often to keep child safe, 46%▲
- Use tech to stay in touch with family daily, 55%◉
- Use geolocation to keep track of child, 80%▲
- It's important to use tech to keep track of child, 70%▲
- Worry often about inappropriate content on digital tech, 46%◉

DEVELOPMENT

Digital tech has positive effect on child's:
- Intellectual development, 69%◉
- Social life, 62%◉
- Emotional wellbeing, 58%◉
Tech often helps child:
- Gain knowledge and skill, 61%◉
- Succeed in school, 50%◉
- Become more independent, 48%▲
- Make or strengthen friendships, 47%▲

PRODUCTIVITY

Use of tech is often a productive use of my time, parents: 54%▲, teens: 58%◉
Use of tech is often a productive use of child's time, 46%▲
Use tech weekly:
- For family scheduling (71%▲) and planning events, 53%▲
- To shop online, 61%◉
- For information on child's school, 70%▲
- To learn new skills, 75%▲
Worry often about child's (44%◉) and own digital addiction, 38%▲
Child often wastes time using tech, 39%▲
Child often stays up late (27%◉) or skips meals to use tech, 24%▲

CONNECTION

Tech has positive effect on:
- Feeling connected as a family, 71%◉
- Balancing alone and together time, 60%◉
- Spending IRL together, 55%◉
- Stay in touch with extended family, 73%◉
Use tech often to:
- Spend more time together as a family, 48%▲
- Relax and unwind, 58%▲
- Occupy or pacify child (75%▲) or as a reward, 63%▲
Tech is often a source of tension, 28%▲

IN SEARCH OF BALANCE

Thai families have a high level of engagement in digital tech, but only half of parents feel that they have a good balance in their digitally connected vs. unplugged time. In addition, most feel overwhelmed by the constant changes and developments with digital technology, more so than the global average. They also feel that child knows more about tech than they do. The majority are interested in learning more about how to use digital tech to improve their family's wellbeing.

Thai parents tend to employ family tech rules and parental control apps at levels comparable to the global average. However, they are less likely to have rules about the content that their child views on their devices.

Lower income Thai families are less likely to feel that their family has a good balance in their tech usage. Higher income families are more likely to feel overwhelmed by tech and to be interested in learning more about how to use digital tech to improve their family's wellbeing.
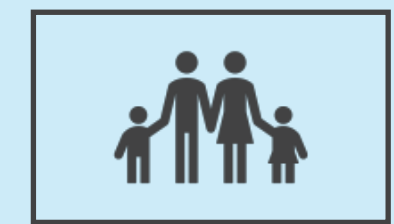
More Thai parents feel overwhelmed by tech than feel their family has a good balance in their digital tech use. They report average levels of family tech rules and usage of parental control apps.
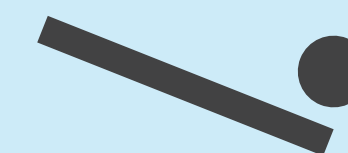
BALANCE

Family often has a good balance between tech and unplugged times, 52%◎

FAMILY RULES
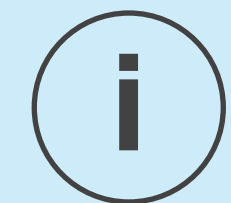
Have rules around digital tech:
- Amount of time child can use tech, 41%◎
- What child can watch, 28%▼
- No devices during dinner, 41%◎
- Use parental control apps to control time on tech (18%◎) or block content, 21%◎

FEELING OVERWHELMED

- Feel overwhelmed by constant changes in technology, 73%▲
- Child knows more about technology than parents do, 60%▲

SEEKING HELP

Interested in information on digital wellbeing, 76%◎

▲ Over-index (>120) compared to global average
◎ Global average
▼ Under-index (<80) compared to global average

6

DIGITAL WELLBEING OF FAMILIES

IN CONCLUSION

IN CONCLUSION

Digital devices have evolved into multi-purpose tools for the family and the home (like digital Swiss Army knives).

Families have become highly reliant on these devices to tackle many tasks and to satisfy many appetites (for information, excitement, social connection, relaxation, creative expression).

Reliance on devices and the integration of devices into daily family life is extensive, and only growing more so.

Digital devices have introduced new ways of parenting, new tools for parenting, new demands on parents, and new parental worries.

They have created new behaviors among children, new social norms, new expectations, and new ways of socializing.

Myriad aspects of parenting, family interaction, and individual pursuits now pass through or involve digital devices, which alters those activities and interactions – sometimes it alters them in subtle ways, sometimes in large ways, like a distorting lens.

Parents are highly cognizant of the change. They are uncertain as to what the long-term results will be, and aware of possible developmental costs, though they generally remain optimistic for their kids.

This study suggests that parents are in the process of adapting to these new technologies and to a new norms in parenting and family dynamics.

Each family has adopted – consciously or by default – its own modus operandi with respect to digital technology. Not all families are content with their current condition. Those who search for more optimal solutions tend to have ambitious goals for their children's success and for their families' wellbeing.

The research identified four distinct family personas based on their relationship to digital technology and their experiences of family wellbeing. These personas exist across the 11 countries surveyed, but the prevalence of each persona varies in each country. Each family persona has a different perspective on achieving balance in their family life.

Well-Adapted have a clear sense of equanimity in their lives, and that extends to their relationship with digital tech. They believe they know how to use digital technology in a healthy way and they feel their family does a good job balancing the use of digital technology and spending time "unplugged." They also believe that digital tech can play a role in achieving balance, particularly in spending time together with family and time alone. Their championing of tech and their interest in being the first to try new offerings presents a clear opportunity to provide additional digital tools which nurture and deepen family relationships.

While **Strivers'** frenetic pace of both tech and non-tech activities and their high levels of stress would seem to imply a lack of balance, their own perception belies this assumption. Strivers feel they do a good job of adapting and achieving balance with using digital tech and being "unplugged." They also talk to their children about healthy ways to use tech. An opportunity area for this segment are additional tools to help with time management and achieving their numerous goals.

The **Coasters** are a bit of an enigma. Although they report low levels of family wellbeing, they appear to think they are doing a good job adapting to the changes and challenges presented by tech. Digital tech is not a source of stress or concern. They believe they are knowledgeable about how to use digital tech in a healthy manner. Their reports on their digital tech usage would indicate that their solution is to use digital tech less frequently.

Of the four personas, **Unhappy Campers** are the segment with the greatest feeling of instability and lack of balance, particularly as it relates to their use of digital technology. They do not feel they are achieving a good balance between time spent with tech and time spent "unplugged." They do not feel knowledgeable about healthy ways to use technology, nor are they talking frequently to their children about this topic. This segment could benefit the most from tools to alleviate stress, yet they are also the most resistant to digital tech having a positive impact on their wellbeing.

ABOUT FLUENT

Fluent is a consulting firm specializing in research that informs the development of public policy, educational programs, media and technology focused on children's education, health and wellbeing. Fluent's work centers around three practice areas: thought leadership research, formative research and evaluation, and social impact assessment. We have applied rigorous and innovative research solutions in service of promoting children's access to and quality of education, and gender equality in the U.S. and in over 70 countries around the world.

Fluent Research

845 Third Avenue, Sixth Floor

New York, New York, 10022

www.fluentresearch.com

Research Lead

Nellie Gregorian

+1.646.701.2955

ngregorian@fluentresearch.com