# PARENTS

## in a Digital Age · 2015

Hi Mama Inc. ("HiMama") works with child care and early learning programs to help them communicate with parents more effectively and privately with a secure, password protected platform. We aim to engage parents in children's development and empower educators to build stronger relationships with families.

Children and parents are the focus of our creations, which enable real-time communication of information between educators and families. We also strive to provide child care directors and supervisors with the information they need to stay on top of their operations.

HiMama is a private company based in Toronto, Canada. For more information please visit www.himama.com. For further information on the contents of this report or to receive copies, please contact research@himama.com.

# Executive Summary

In 2014, it was no surprise to see technology playing an increasingly prevalent role in everyday life. From social media and crowdsourcing, to smartphones and the on-demand economy, digital technologies are pervasive in our lives, and families with young children are no exception.

Here at HiMama, an online platform for child care programs and parents, we are at the nexus of child-rearing and technology, and we care deeply about these topics. We sense and inherently know that attitudes around technology and parenting are changing, but found little research on the topic. As a result, we decided to survey parents to explore this area in our inaugural study, *Parents in a Digital Age 2015.*

We surveyed parents of young children aged 0 to 14 in Canada and the United States and found some interesting patterns.

## Parents are concerned about digital security and privacy for their children and increasingly so

Our survey revealed that nearly 70% of parents were either concerned or very concerned about digital security and privacy for their children. Furthermore, most parents' outlook on digital security and privacy had worsened since the previous year.

## Parents' attitudes towards digital security and privacy do not align to their actual behaviors

While parents are clearly concerned about digital security and privacy, their behaviors do not directly reflect this concern. For example, about 42% of parents are posting photos of their children on social networks at least once a month, with over two thirds posting at least several times per year. Yet, over half of parents were unaware that Facebook, the biggest online social network, owns the digital rights to photos posted on their site.

## There is a discrepancy between the way parents would like others to share photos of their child online and how others are actually sharing

A definitive majority of parents (59%) said that they agreed or strongly agreed that they would like more information about their children's activities while at school or child care, implying that most programs are failing to engage parents effectively. Where information was being shared digitally by schools and child care centers, there was a clear disparity between parents' desires for information to be shared through a private password protected site and actual sharing practices through public websites or blogs, as well as Facebook and other social networks.

In 2014 there was no escaping the technological changes happening in the many facets of our lives. Our philosophy at HiMama is to embrace technology and understand how it can best be utilized to improve outcomes for children while carefully protecting the safety and privacy of our next generation. Studying the attitudes and outlooks of parents helps us to understand how best to achieve this and so we hope you'll find the results of this study as informative as we have.

Sincerely,

**Ron Spreeuwenberg**
CEO, HiMama

**"There can be no keener revelation of a society's soul than the way in which it treats its children."**

- Nelson Mandela

# Technology in 2014: A Year In Review

There was a whirlwind of activity in 2014 with technology advancements in a diverse range of fields. Key themes included cloud computing, crowdfunding, mobile development, wearables (Google Glass) and 3D printing. There was no shortage of concepts coming to market.

Newsmakers included Netflix, Uber, Google, Apple, Sony and Alibaba. Cord cutting of cable became easier with big networks offering an online option as well as through cable – CBS was the first. HBO and Showtime are expected to follow suit in 2015. Then there was the rise of Uber; despite plenty of controversies, the company's growth has been undeniable as it now operates in 52 countries.

On the business front, Google bought Nest for $3.4B in January to drive internet connected devices in the home. Apple bought Beats for $3.2B from Dr. Dre and saw its celebrity customers' photos revealed from iCloud. Alibaba had the biggest IPO of all time in the US, making the company worth more than $200B. Sony was hacked for releasing the movie *The Interview.*

To determine global areas of interest, looking at Google search data is insightful. Google's Global Top 10 Searches for 2014 were:

1. Robin Williams
2. World Cup
3. Ebola
4. Malaysia Airlines
5. ALS Ice Bucket Challenge

6. Flappy Bird
7. ConchitaWurst
8. ISIS
9. Frozen
10. Sochi Olympics

The ALS Ice Bucket Challenge (number 5) was an amazing online campaign that set records in online fundraising and video production with 5.8m videos posted on YouTube. The first child-oriented search term came in at number 9, Frozen, the Academy Award winning film from Disney. Frozen is already the second highest grossing animated film of all time, and kids everywhere love it – from the funny Olaf to the caring Anna, it was the kids mega hit of 2014.

These are the larger social trends around technology in 2014 that set the context for parents' feelings, attitudes and behaviors in the digital age.

# Methodology

**T**he survey results contained in this report are based on data gathered from parents living in Canada and the United States. Parents are screened to have young children aged 0 to 14 years of age and responded online over a two week period in December of 2014. The total number of parents who completed the full survey was 431. The sampling was analyzed qualitatively and was representative from the perspective of geographies, income levels and child age groups.

# Parents Feelings, Attitudes and Behaviors in Relation to their Children's Information Online

The first part of our survey looked at parents themselves – their perspectives and behaviors in regards to their children's information online. Overall, it is clear that this is an important topic for parents. Parents are concerned about digital security and privacy for their children, with nearly 70% of parents indicating their concern, 43% of which were "very concerned".

**Exhibit 1.  How concerned are you about digital security and privacy for your children?**
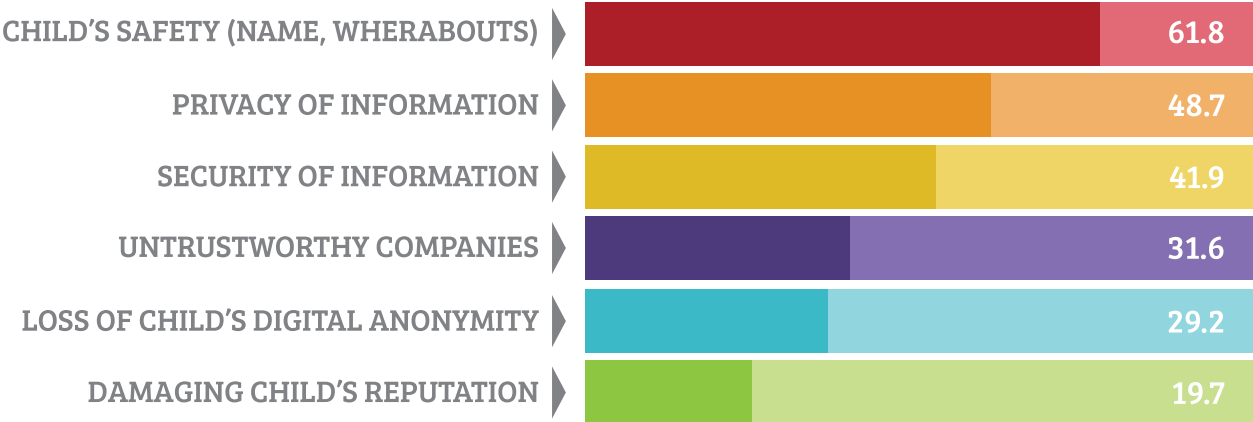


| | |
|---|---|
| VERY CONCERNED | 43.2% |
| | 26.1% |
| | 17.5% |
| | 7.0% |
| NOT CONCERNED AT ALL | 6.3% |

> **"Parents are concerned about digital security and privacy for their children."**

Drilling down into what elements were most concerning to parents, we found that child safety, privacy of information, and security of information were parents' three most cited elements of digital concern.

**Exhibit 2. What worries you about having your children's information online?**
**Respondents per 100 parents**

| | |
|---|---|
| CHILD'S SAFETY (NAME, WHERABOUTS) | 61.8 |
| PRIVACY OF INFORMATION | 48.7 |
| SECURITY OF INFORMATION | 41.9 |
| UNTRUSTWORTHY COMPANIES | 31.6 |
| LOSS OF CHILD'S DIGITAL ANONYMITY | 29.2 |
| DAMAGING CHILD'S REPUTATION | 19.7 |

Parents' impressions in 2014 were likely impacted by news items around hacking and cyber bullying with 57% of parents responding that their outlook on digital security and privacy for their children had worsened in 2014 from the prior year.
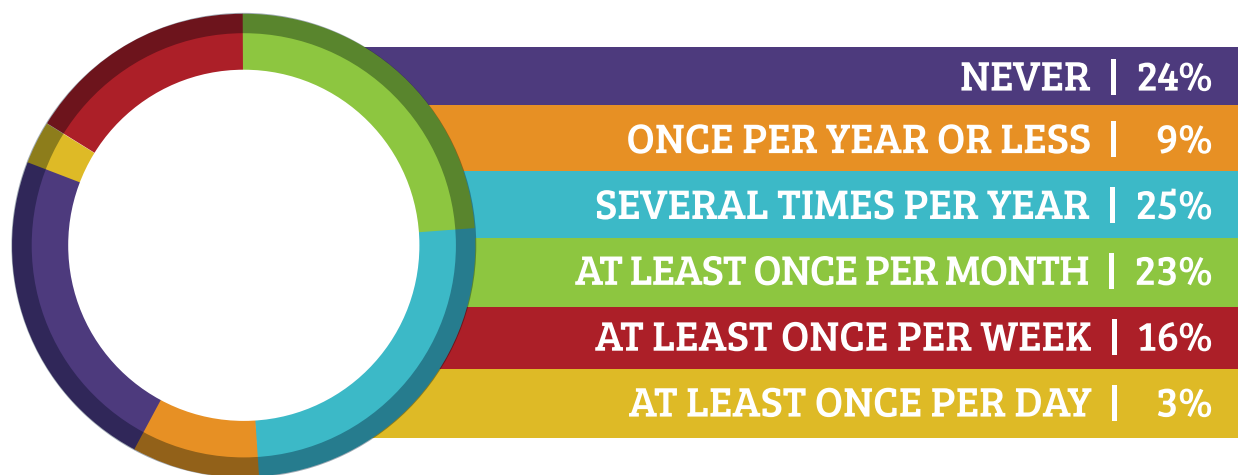
**Exhibit 3. Has your outlook on digital security and privacy for your children improved or worsened since last year?**

**43%** IMPROVED        **57%** WORSENED

While parents have strong concerns that appear to be worsening, they still were very active posters to traditional social media, illustrating that either they do so in spite of their views, have trust in the companies operating social media websites, do not have satisfactory alternatives for sharing their photos or are not aware of the alternatives. While only a small number of parents were posting photos daily (3%), a large proportion of parents (42%) were posting photos of their children to social media at least once a month.



**Exhibit 4. How often do you post photos of your children on social networks?**



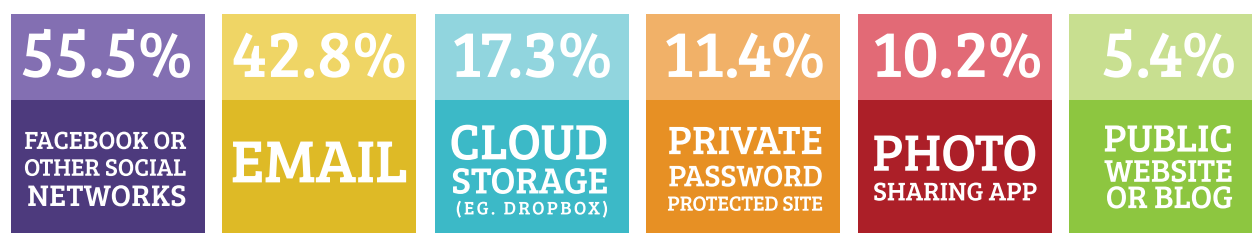| | |
|---|---|
| NEVER | 24% |
| ONCE PER YEAR OR LESS | 9% |
| SEVERAL TIMES PER YEAR | 25% |
| AT LEAST ONCE PER MONTH | 23% |
| AT LEAST ONCE PER WEEK | 16% |
| AT LEAST ONCE PER DAY | 3% |

The dominant channels for sharing photos of children were Facebook and other social networks, as well as email, which dwarf the other methods for sharing photos. This is an interesting result when contrasted against parents' concerns about digital security and privacy for their children. While a private password protected site would be a much safer way to share photos, for example, a much smaller percentage of surveyed parents actually used this channel.

**Exhibit 5. How do you share digital pictures of your children with family?**
**Respondents per 100 parents**

| 55.5% | 42.8% | 17.3% | 11.4% | 10.2% | 5.4% |
|---|---|---|---|---|---|
| FACEBOOK OR OTHER SOCIAL NETWORKS | EMAIL | CLOUD STORAGE (EG. DROPBOX) | PRIVATE PASSWORD PROTECTED SITE | PHOTO SHARING APP | PUBLIC WEBSITE OR BLOG |

What may partially explain parents' behavior is a lack of transparency or knowledge about privacy on social networks. For example, over half of parents were unaware that posting photos to Facebook gives ownership rights of these photos to Facebook. This fact would likely cause trepidation for those parents that were unaware of this.

> "Over half of parents were unaware that posting photos to Facebook gives ownership rights of these photos to Facebook."

# Parents Feelings and Attitudes Towards How Others are Posting their Children's Information Online

**T**he misalignment between parents' attitudes towards digital security and privacy and their actual behavior suggests that parents are struggling to manage the digital presence of their children online.
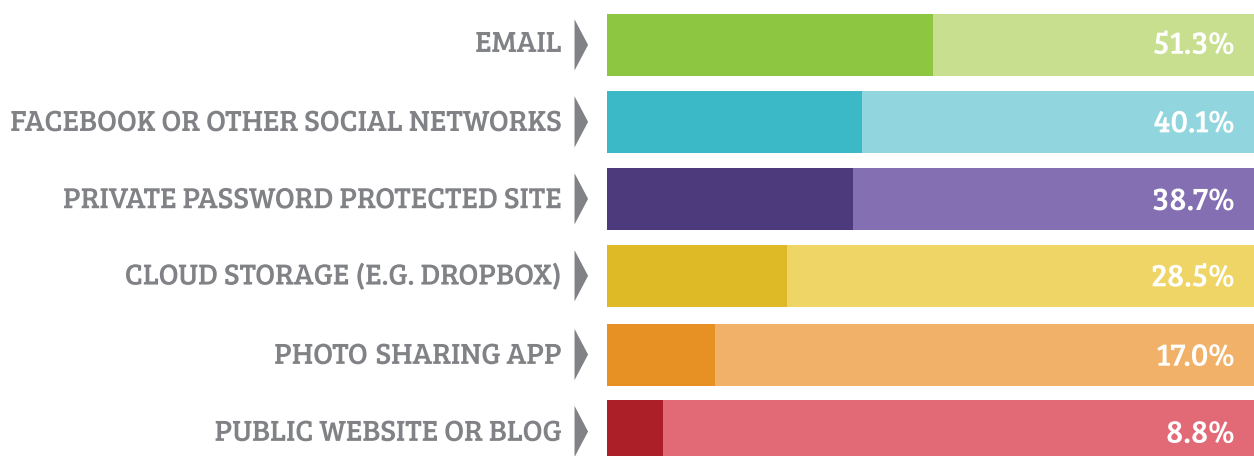
While in control, they can choose what photos are taken and where, and if this information is posted or distributed online. The results of this study suggest that this is a complex topic for parents, who use a number of different tools to share photos of their children, yet whose level of concern is high and appears to be worsening.

With approximately 40% of all children under five spending part of their week in the care of someone other than a parent, influencing the way photos from third parties are shared is equally as important and even more difficult to manage for parents. Schools and child care centers are the most common locations where children spend their time away from parents and are the most likely places for children to have their photos taken and distributed. Family caregivers and family members are other likely sources.

About half of parents surveyed indicated that they would be comfortable with email for photo sharing from family members, with social networks and private password protected sites also getting substantial support. It is interesting to see that parents' support for social networks dropped significantly when it was family posting photos (40 of 100) versus themselves (55 of 100).

Similarly, parents were significantly more likely to prefer private password protected sites when family members were sharing pictures (39 of 100) relative to when they had control in sharing themselves (11 of 100).

**Exhibit 6. Would you feel comfortable with your family sharing pictures of your children through the following channels?**

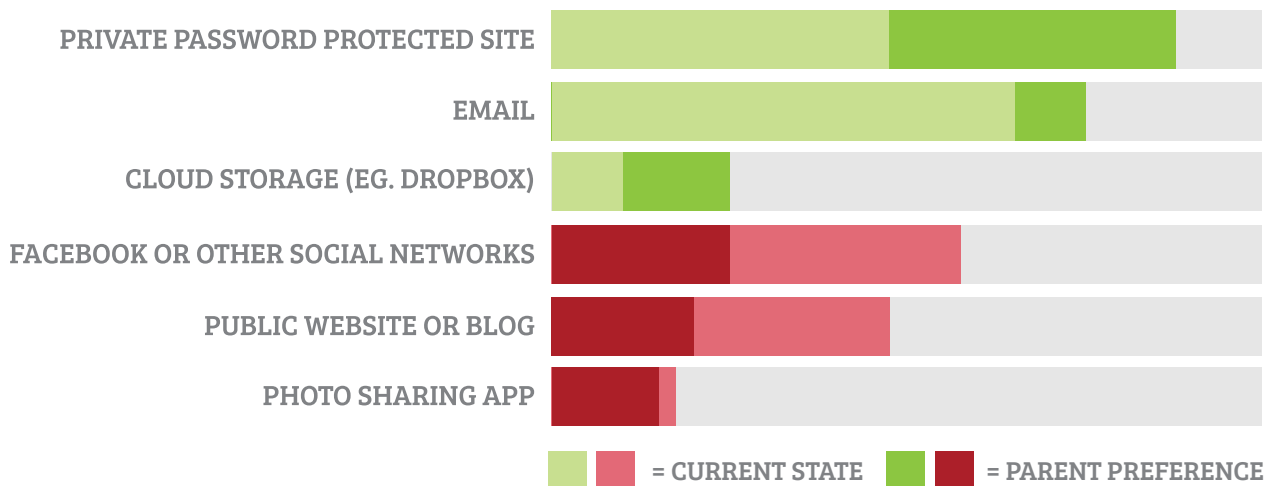| Channel | Percentage |
|---|---|
| EMAIL | 51.3% |
| FACEBOOK OR OTHER SOCIAL NETWORKS | 40.1% |
| PRIVATE PASSWORD PROTECTED SITE | 38.7% |
| CLOUD STORAGE (E.G. DROPBOX) | 28.5% |
| PHOTO SHARING APP | 17.0% |
| PUBLIC WEBSITE OR BLOG | 8.8% |

With respect to child care centers and schools, the highest recommended industry standards encourage frequent and detailed documentation (e.g., photos, notes, work samples). While the frequency and detail of documentation was not a topic of study in this survey, the channel in which this documentation was distributed was assessed. The study ultimately revealed a gap between the method in which photos were being shared in practice and how parents would prefer these photos to be shared.

When child care programs and schools are sharing digitally, parents showed a strong preference for password protected private sites – over 35% of parents selected this as their preferred method to receive photos from their child care centers. In contrast, this is not one of the top ways in which they are receiving photos today. Parents want significantly less photos posted on Facebook, other social networks, public websites and blogs.

**Exhibit 7. How would you like your child care program or school to distribute digital photos of your child?**
**Current state vs. parent preference**

PRIVATE PASSWORD PROTECTED SITE

EMAIL

CLOUD STORAGE (EG. DROPBOX)

FACEBOOK OR OTHER SOCIAL NETWORKS

PUBLIC WEBSITE OR BLOG

PHOTO SHARING APP

= CURRENT STATE        = PARENT PREFERENCE

Research has shown that communication is a key indicator of quality for child care programs which is corroborated by our survey results, illustrating the demand from parents for increased communication.

A majority of parents (59%) agreed that they would like more information about their child's activities and learning while at school or child care, and therefore would benefit greatly from more frequent communication.

**Exhibit 8. How do you feel about the following statement: I would like more information about my child's activities and learning while in a child care program or school.**



| | |
|---|---|
| STRONGLY AGREE | 32% |
| AGREE | 27% |
| NEITHER AGREE OR DISAGREE | 24% |
| DISAGREE | 7% |
| STRONGLY DISAGREE | 10% |

**"Parents want significantly less photos posted on Facebook, other social networks, public websites and blogs."**

# Report Roundup

**T**his study has revealed that parents are thinking about and are concerned about the digital security and privacy of their children's information online.

Yet, the results of the study also revealed that parents were more relaxed about posting information of their children online relative to their stated concerns about their children's online presence. This inconsistency is an interesting finding that likely results from a multitude of factors, including the lack of alternatives for online sharing and a lack of awareness of these alternatives.

When it comes to others sharing information about their children, parents are more conservative about how this information is shared online, preferring email and private password protected sites. This is not unexpected as the content is not in their control and they may not have the ability to approve photos or videos before they're posted online.

Finally, for child care programs and schools, there is a significant gap in their current state of sharing children's information and the expectations and preferences of parents. The majority of parents would like more information about their children's activities and learning while in these programs. Also, the channels used for sharing do not align with parents' preference for private password protected sites over other channels.

It is incumbent on all stakeholders, from parents themselves through to child care programs and schools, to educate themselves on cyber security and safety. Only through well-informed decisions can we ensure the security and privacy of children's information online while also taking advantage of the many wonderful benefits that this digital age has to offer.

# www.himama.com

# himama

To learn more about Hi Mama Inc. or to receive information about our latest initiatives, please visit www.himama.com or contact us at research@himama.com.