

CYBERBALANCE SURVEY RESULTS

November, 2015



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About the study:

- Gathered information and Perspectives
 - Michael Rich, MD, MPH "The Mediatrician"
 - Kimberly Young, PsyD
 - Dr. Suzanne Martin Ph.D. who conducted the research



Made possible through the generous support of AT&T

Objectives and Goals

- To advance the visibility of cyberbalance and digital health
- To understand and help families create safe and healthy digital experiences

Methodology

MODE	Online Survey
LENGTH	10 minutes
DATES	Sept 14-21, 2015
AUDIENCE	n=1,003 n=100 Tweens (8-12 years old) n=100 Teens (13-17 years old) n=803 Adults (18+ years old)
GEOGRAPHY	United States
	• • • •

*Tween interviews were assisted by a parent *Note small bases size for ethnic sample

EXECUTIVE SUMMARY

Executive Summary

While dependence on technology is growing, many are unsure whether they have achieved the balance between on and offline activities that is necessary to enjoy a thriving, healthy life in today's digital culture. iKeepSafe interviewed tweens, teens, and adults from across the United States to capture generational differences in thoughts and habits surrounding technology use and health.

Most tweens rely on their parents for information about balancing technology, but many adults report confusion over what cyberbalance entails, and half of adults are uncomfortable declaring themselves good examples of cyberbalance. Both children and adults admit their biggest challenge is managing distractions, and a full third of respondents share that digital device use has replaced an activity they used to love.

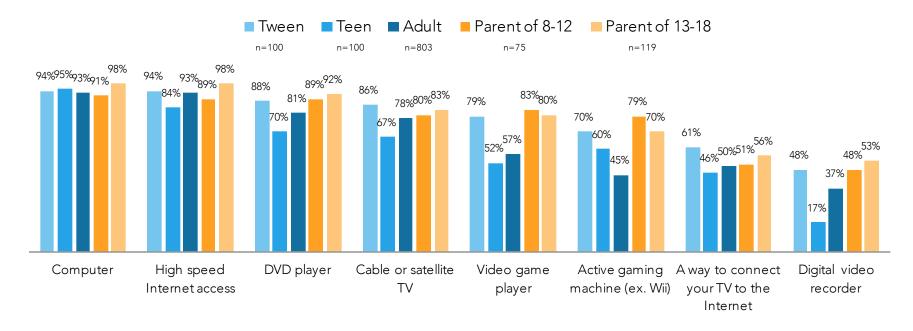
Many reported that screen time interfered with sleep, with 29% of tweens, 44% of teens, and 26% of adults experiencing sleep deprivation. Work disruption was an additional difficulty, with 40% of teens not completing homework and 25% of adults not completing work due to digital activity. When queried on time spent in front of a screen, everyone suggested an ideal maximum time per age group lower than their self-reported real hours spent. Although kids are experiencing clear difficulty managing their own cyberbalance, only 31% of teens have household rules in place to help teach them healthy habits.

Executive Summary

Despite the challenges reflected in the surveys, we see a number of encouraging trends. Of the parents that have digital use rules, 7 out of 10 feel confident that they are followed by teens. 1 out of 6 tweens are not allowed to use cell phones at the dinner table, and 6 out of 10 tweens follow device usage limits. More people are using technology to support better health, such as fit bits and apps to track diet. Additionally, survey respondents reported that friends and family are still more important than digital devices. People of all ages are struggling to maintain a healthy cyberbalance, but they are interested in learning strategies and teaching healthy habits. iKeepSafe's goal is to utilize the trends and opportunities identified in this research to support cyberbalance education in the most useful and relevant way.

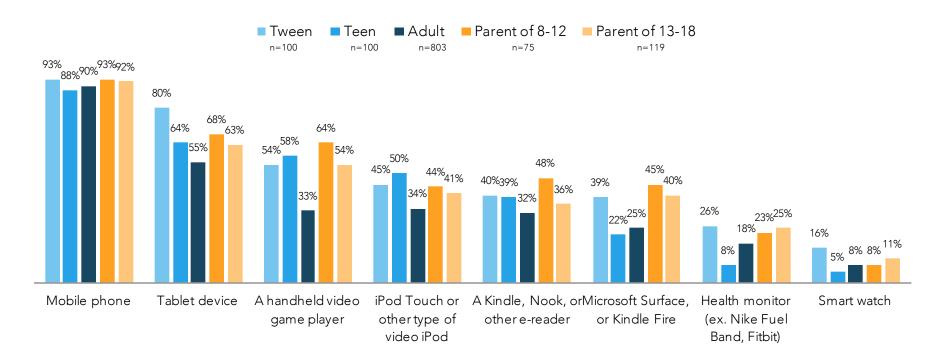
TECHNOLOGY IN THE HOUSEHOLD

Household Technology Used: The most ubiquitous technology is a computer with high speed access.



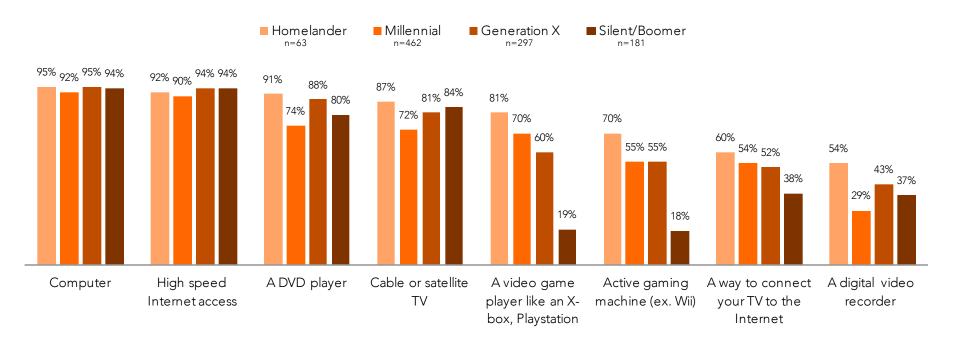
By Age

Household Technology Used: (cont'd)



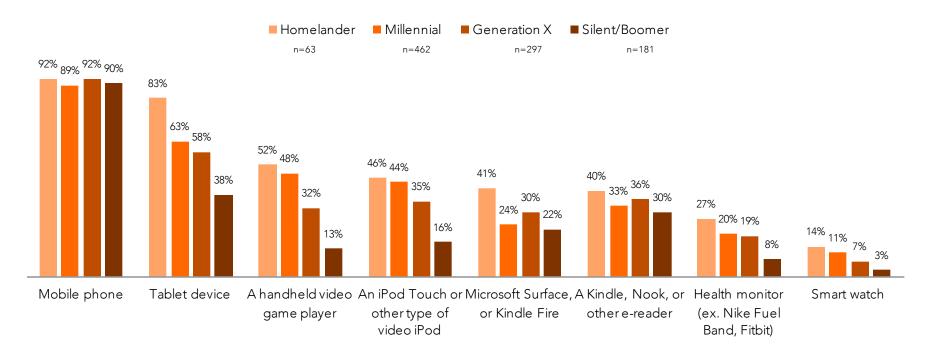
By Generation

Household Technology Used



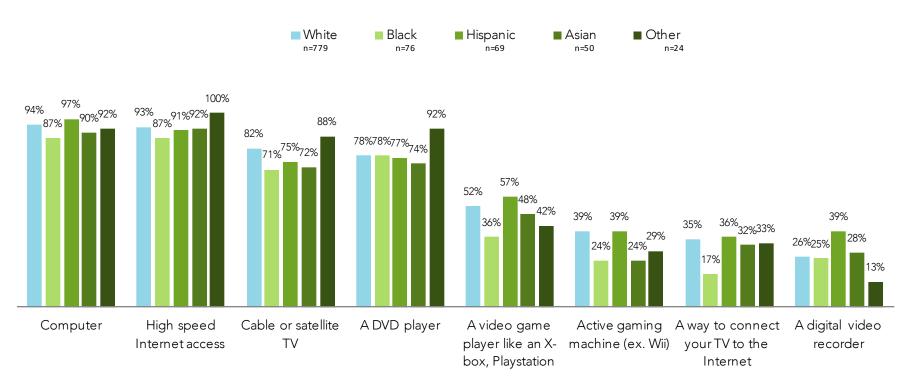
By Generation

Household Technology Used (cont'd)



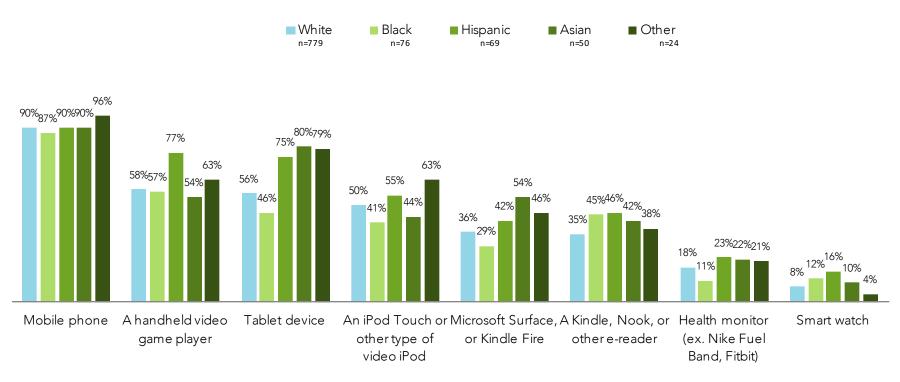
By Ethnicity

Household Technology Used



By Ethnicity

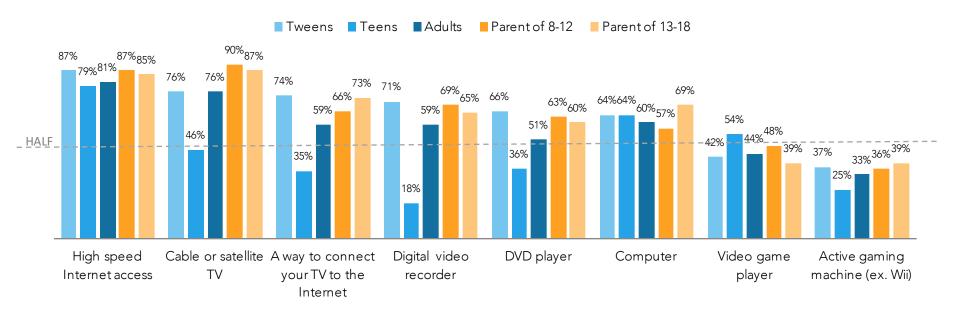
Household Technology Used (cont'd)





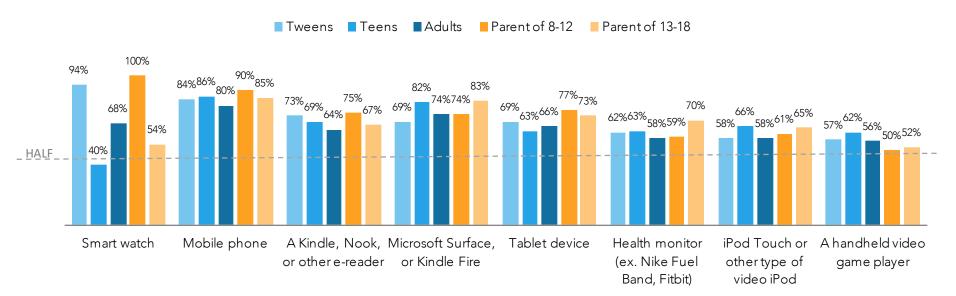
Household Technology Used in Bedrooms

% Always/Often



Household Technology Used in Bedrooms (cont'd)

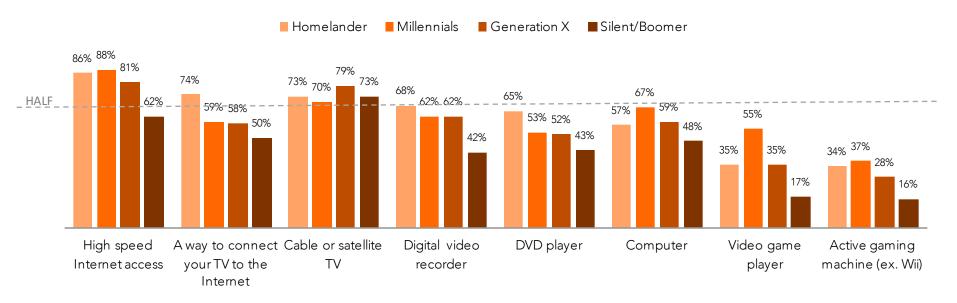
% Always/Often



By Generation

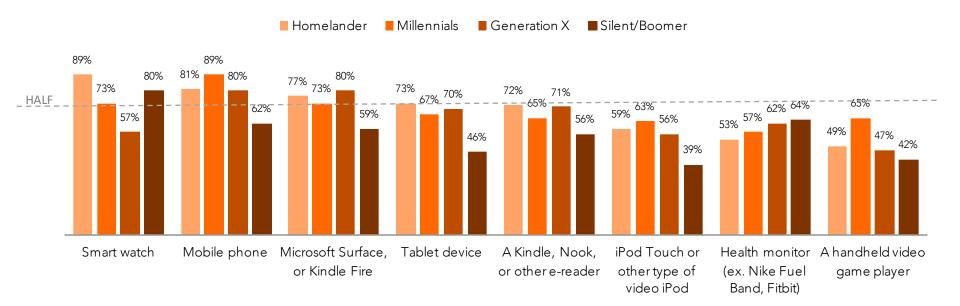
Household Technology Used in Bedrooms

% Always/Often



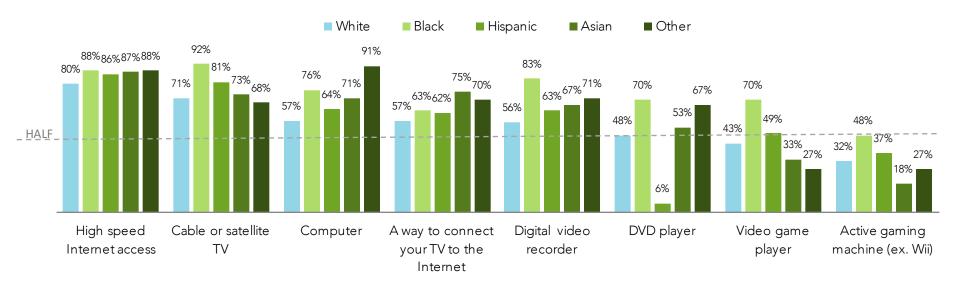
Household Technology Used in Bedrooms (cont'd)

% Always/Often



By Ethnicity

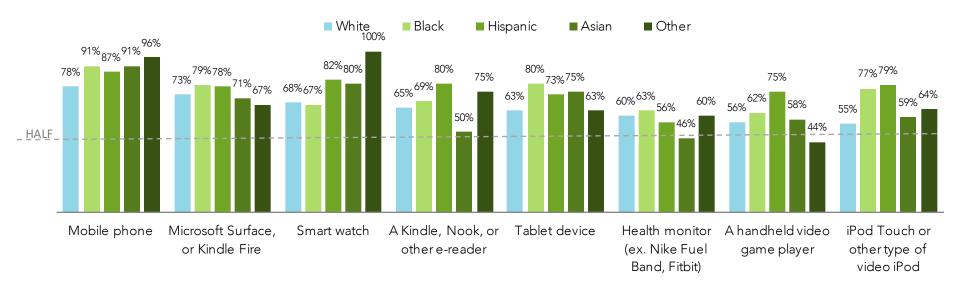
Household Technology Used in Bedrooms



BASE: Have Item in Household (Base varies for each item) Q210 How often are the following digital devices or technology used in your bedrooms at home?

By Ethnicity

Household Technology Used in Bedrooms (cont'd)



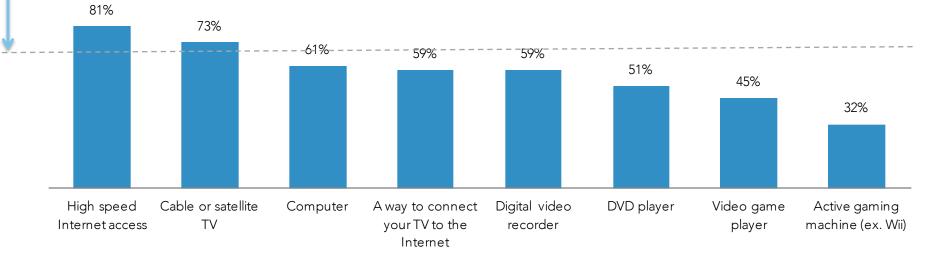
BASE: Have Item in Household (Base varies for each item)Q210 How often are the following digital devices or technology used in your bedrooms at home?



Household Technology Used in Bedrooms

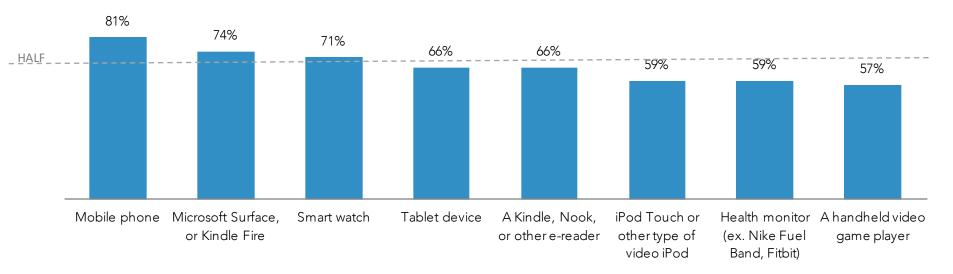
At least half of kids/adults who have access to tech at home, use it in their bedroom always/often. Video game machines are less likely to be used in bedroom.

% Always/Often



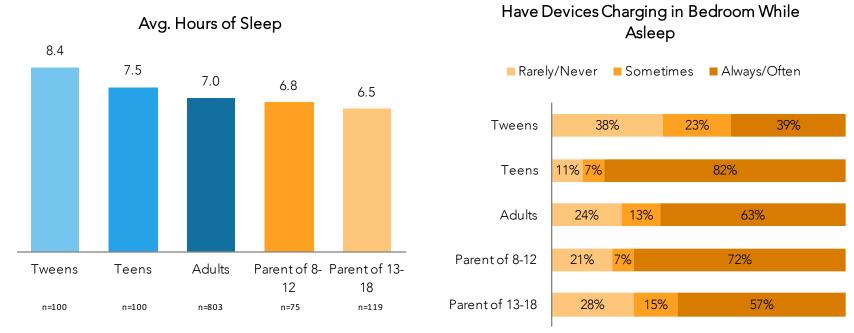
Household Technology Used in Bedrooms (cont'd)

% Always/Often



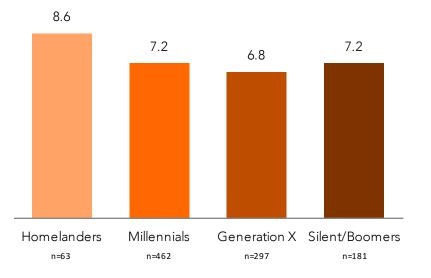


Teens Most Likely to Charge Device in Bedroom During Sleep



Q500 On average, how many hours a night do you sleep? Q510 How often do you have digital devices charging in your room at night? By Generation

Millennials Most Likely to Charge Device in Bedroom During Sleep



Avg. Hours of Sleep

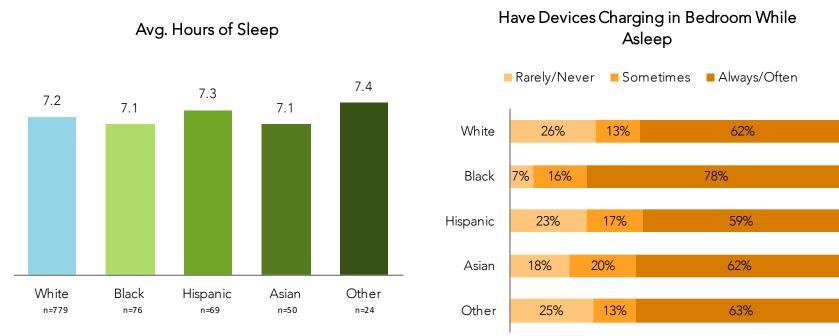
Have Devices Charging in Bedroom While Asleep



Q500 On average, how many hours a night do you sleep? Q510 How often do you have digital devices charging in your room at night?

By Ethnicity

Blacks/African Americans Most Likely to Charge Device in Bedroom During Sleep

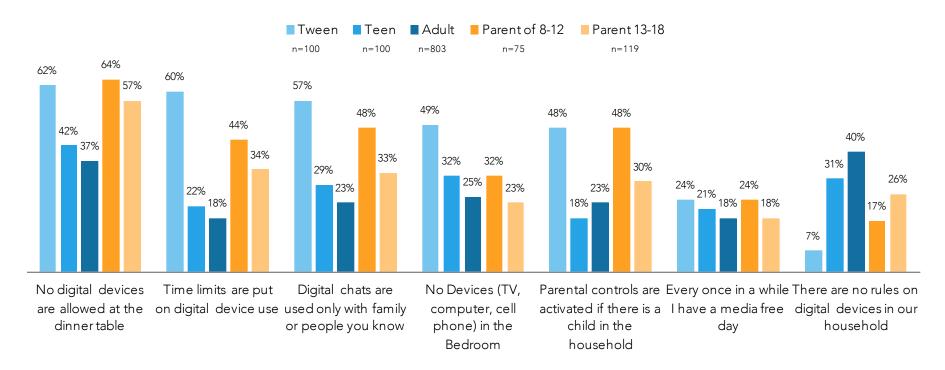


Q500 On average, how many hours a night do you sleep? Q510 How often do you have digital devices charging in your room at night?

TECHNOLOGY RULES IN THE HOUSEHOLD

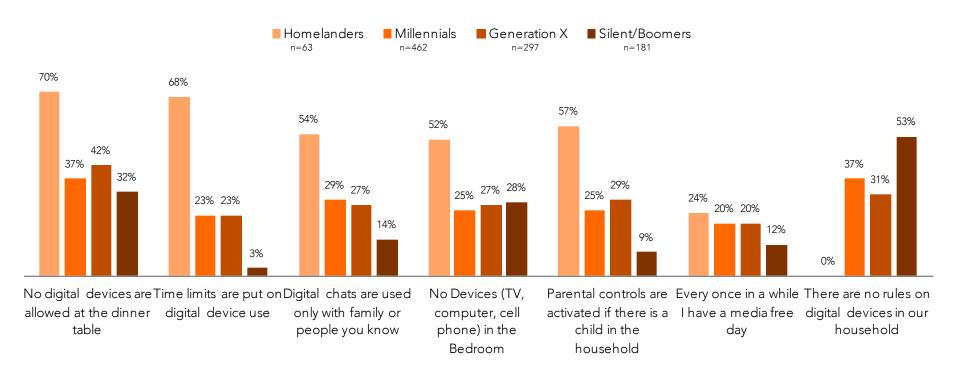
By Age

Digital Device Rules Followed



Q320 Which of the following rules do you follow regarding digital devices?

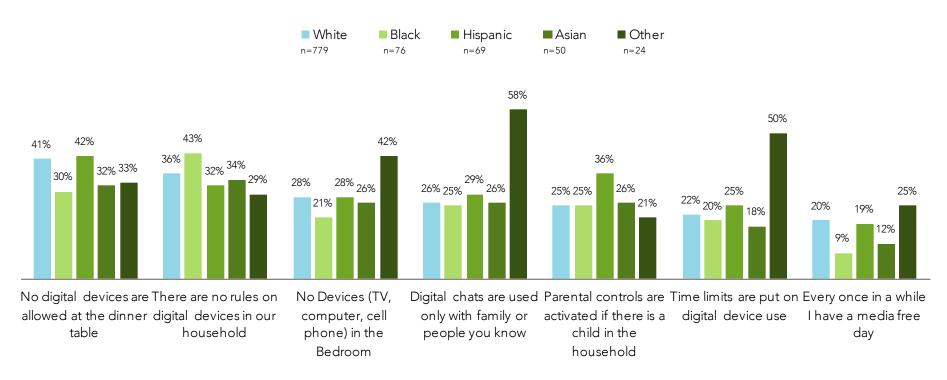
Digital Device Rules Followed



Q320 Which of the following rules do you follow regarding digital devices?

By Ethnicity

Digital Device Rules Followed



Q320 Which of the following rules do you follow regarding digital devices?

By Age

Who's the Tech Expert

Tween (8-12 yrs old)	Teen (13-17 yrs old)	Adult (18+ yrs old)	Parent of 8-12	Parent of 13-18
66% Parent	46% Myself	56% Myself	51% Myself	50% Myself
11% Myself	21% Parent	17% Child	28% Child	29% Child
6% Sibling	11% Sibling	13% Spouse	15% Spouse	10% Spouse
n=100	n=100	n=803	n=75	n=119

BASE: All Respondents Q211 Who is the digital device expert in your home? By Generation

Who's the Tech Expert

Homelander (<10 yrs old)	Millennial (11-33 yrs old)	Generation X (34-54 yrs old)	Silent/Baby Boomer
71% Parent	51% Myself	59% Myself	50% Myself
11% Myself	13% Spouse	19% Child	21% Child
3% Sibling	12% Parent 12% Child	11% Spouse	11% Spouse
n=63	n=462	n=297	n=181

BASE: All Respondents Q211 Who is the digital device expert in your home? By Ethnicity

Who's the Tech Expert

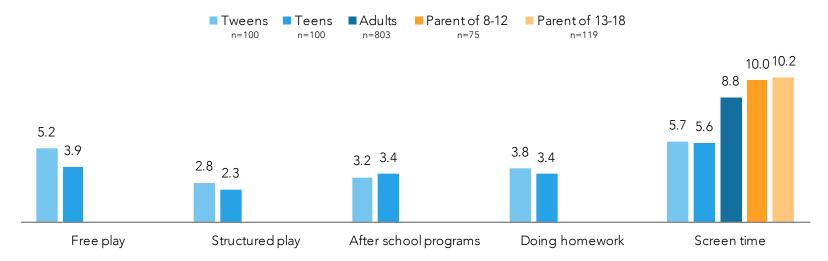
White	Black	Hispanic	Asian	Other
51% Myself	53% Myself	48% Myself	50% Myself	38% Myself
15% Child	16% Child	15% Child	12% Child	38% Parent
13% Spouse	11% Parent	13% Parent	12% Parent	
		10% Spouse	10% Spouse	
n=779	n=76	n=69	n=50	n=24

BASE: All Respondents Q211 Who is the digital device expert in your home?

TIME SPENT WITH TECHNOLOGY

Typical Weekday

Average Hours Spent Each Weekday

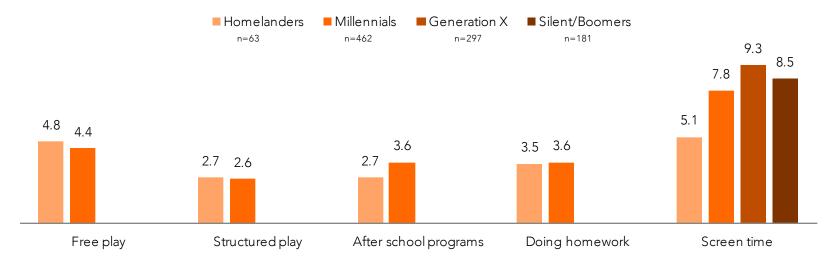


Q300 How much time do you spend each week day in:

By Generation

Typical Weekday

Average Hours Spent Each Weekday

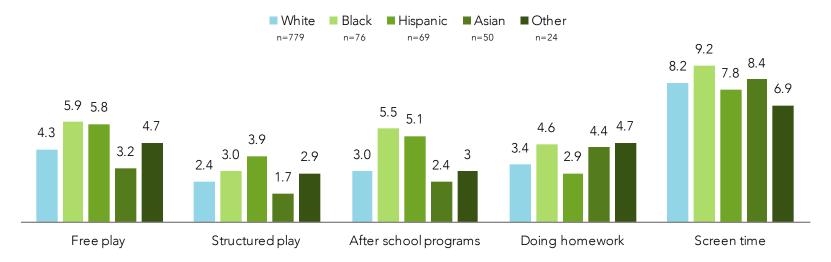


Q300 How much time do you spend each week day in:

By Ethnicity

Typical Weekday

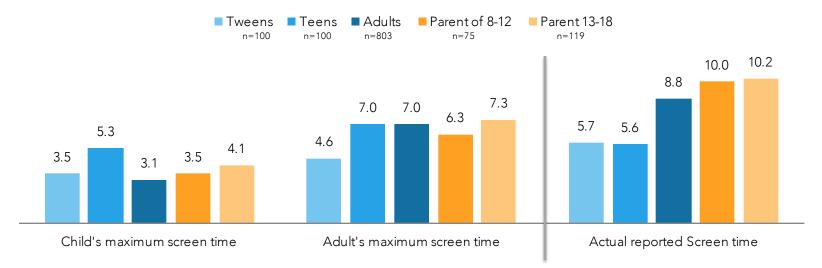
Average Hours Spent Each Weekday



Q300 How much time do you spend each week day in:

Maximum Screen Time Should Have Each Day

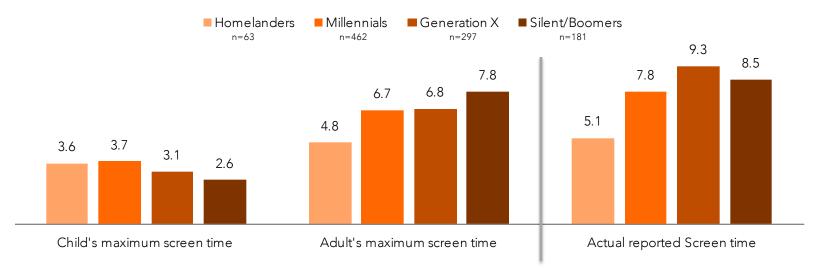
Average Maximum Hours Should Spend on Screen Time



Q300 How much time do you spend each week day in: Q400 What is the maximum screen time a child or adult should have each day?

Maximum Screen Time Should Have Each Day

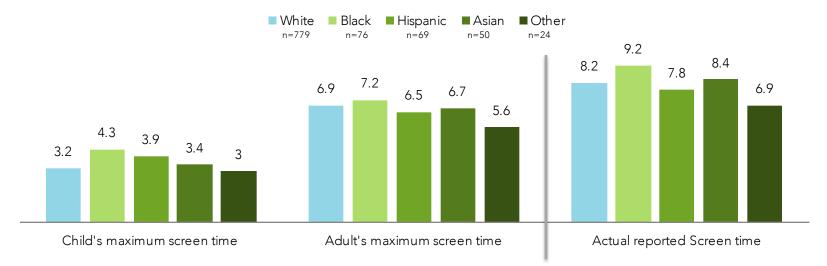
Average Maximum Hours Should Spend on Screen Time



Q300 How much time do you spend each week day in: Q400 What is the maximum screen time a child or adult should have each day? By Ethnicity

Maximum Screen Time Should Have Each Day

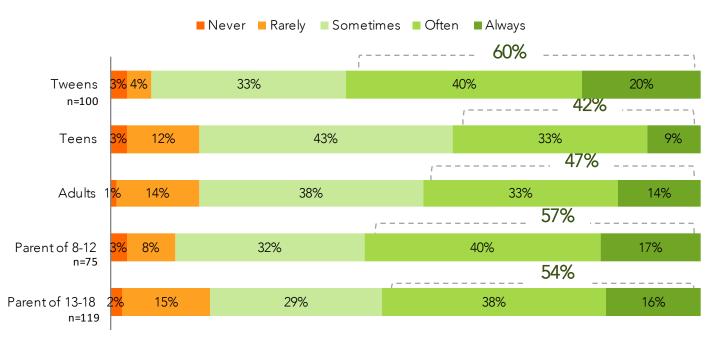
Average Maximum Hours Should Spendon Screen Time



Q300 How much time do you spend each week day in: Q400 What is the maximum screen time a child or adult should have each day?

Tweens Most Likely to Be Offline as Much as Online

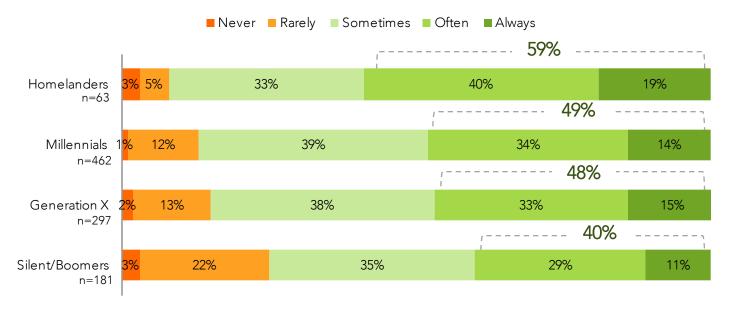
Spend as Much Time Offline as Online



Q310 How often do you spend as much time doing offline activities as online activities?

Homelanders Most Likely to Be Offline as Much as Online

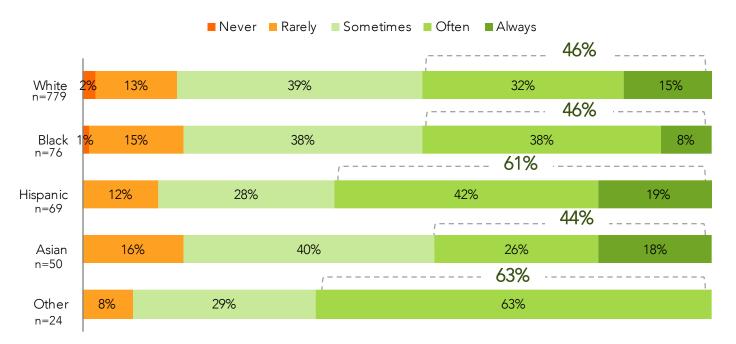
Spend as Much Time Offline as Online



Q310 How often do you spend as much time doing offline activities as online activities?

Hispanic Most Likely to Be Offline as Much as Online

Spend as Much Time Offline as Online



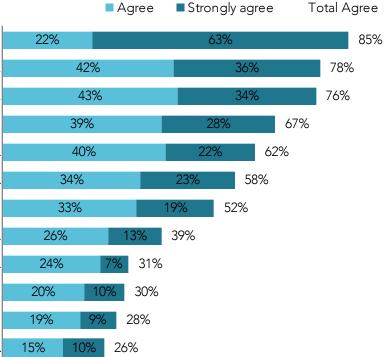
Q310 How often do you spend as much time doing offline activities as online activities?

CYBERBALANCE

Friends and Family are more important than Digital Device Use

Friends and family are more important than digital device use I understand the difference between normal digital device usage... I feel comfortable with the amount of time I spend texting (among... My child has obeyed time limits set for digital device use (among... I have found the right balance between digital device use and time... I am confident setting digital media rules for myself or family... I am a strong positive example of media and digital device use I use apps and online website to track health issues (ex. My Fitness... I've lost interest in some other activities I used to love and replaced... My digital device use interferes with normal every day activities Digital device use causes me not to sleep enough Work or schoolwork is not completed sometimes because time with ...

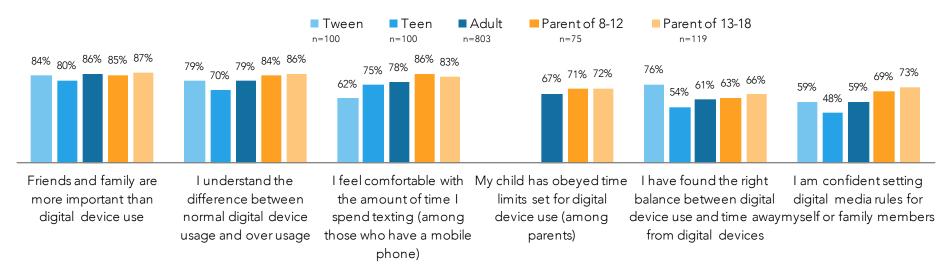
By Total



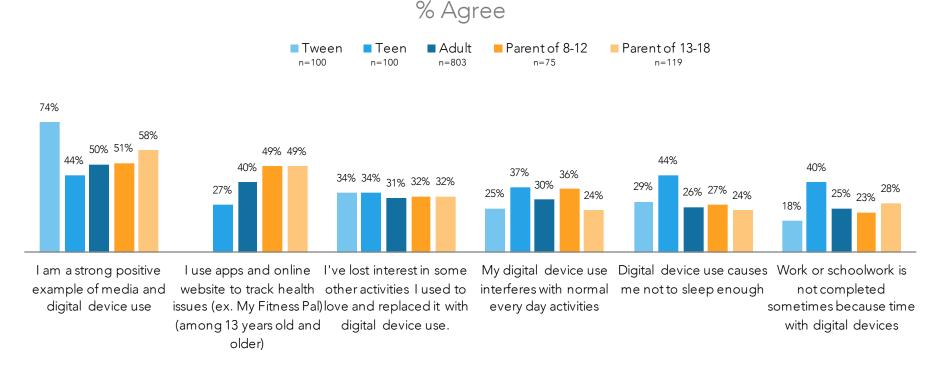


Friends and Family are still more important than digital devices

% Agree

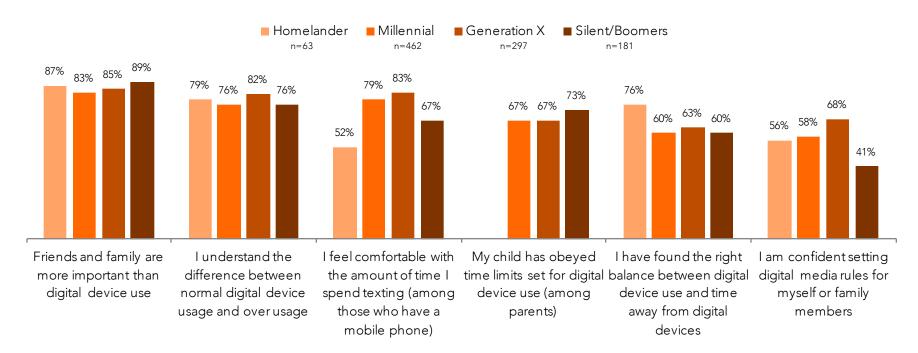


Teens Report Disruption to Normal Life Due to Digital Device Use



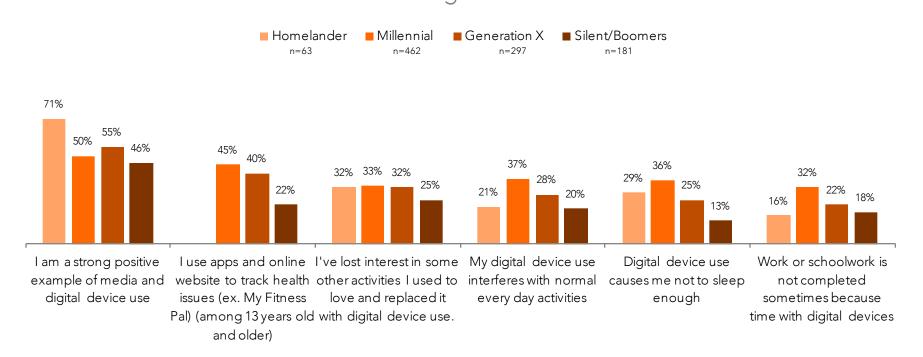
By Generation

Homelanders are Most Confident in their Ability to Balance Digital Devices % Agree



By Generation

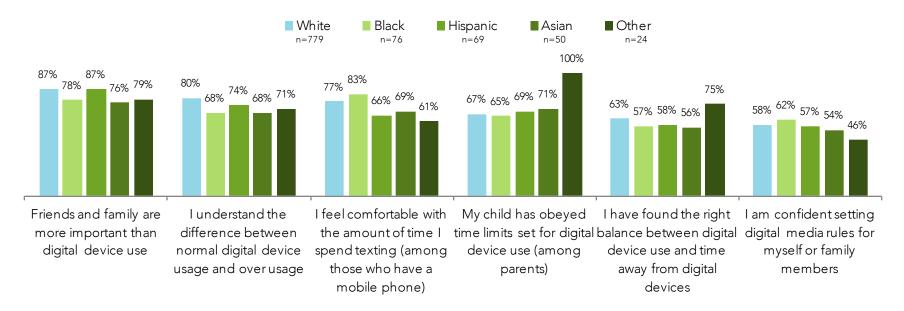
Millennials Most Likely to Report Disruption of Normal Life Due to Digital Device Use % Agree



By Ethnicity

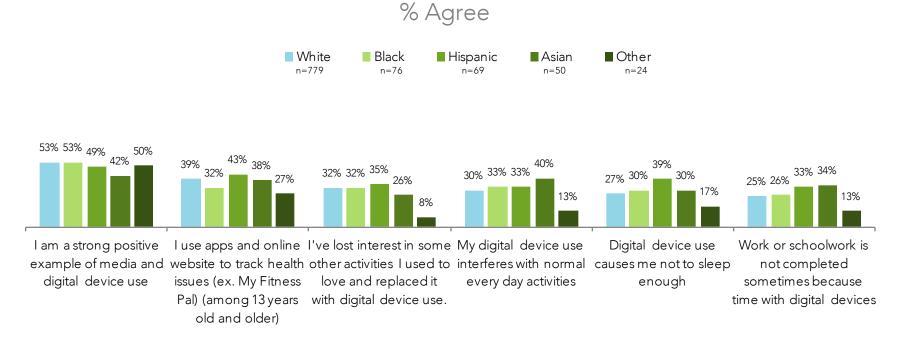
Minorities More Likely to Say Children Obey Time Limits





By Ethnicity

Asian/Hispanic More Likely to Report Disruption of Normal Life Due to Digital Device Use



By Age

Teens have the most difficulty Balancing Devices & Tech



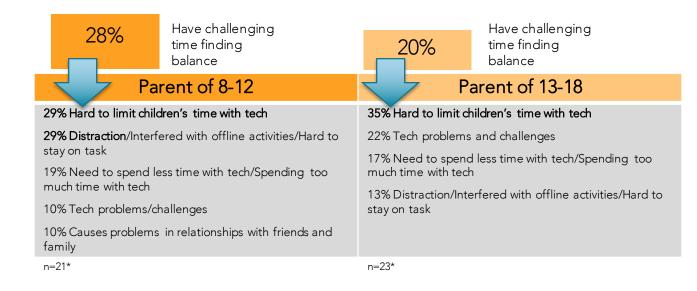
* Small Base Only mentions of >10% shown

BASE: All Respondents

Q430 Have you had a challenging or difficult situation balancing the use of digital devices and technology?

BASE: Had a challenging or difficult situation

Parents' Challenge: limiting children's device time



* Small Base Only mentions of >10% shown

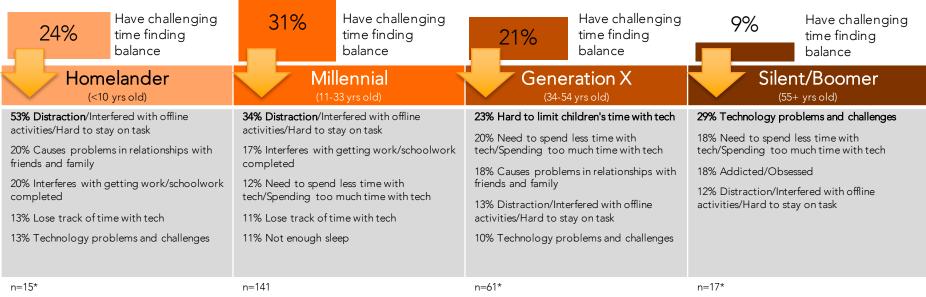
BASE: All Respondents

Q430 Have you had a challenging or difficult situation balancing the use of digital devices and technology?

BASE: Had a challenging or difficult situation

By Generation

Challenges in Balancing Devices & Tech



* Small Base Only mentions of >10% shown

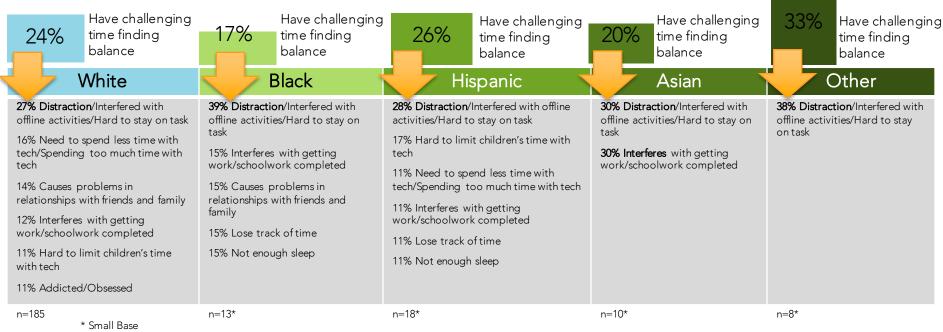
BASE: All Respondents

Q430 Have you had a challenging or difficult situation balancing the use of digital devices and technology?

BASE: Had a challenging or difficult situation

By Ethnicity

Challenges in Balancing Devices & Tech



Only mentions of >10% shown

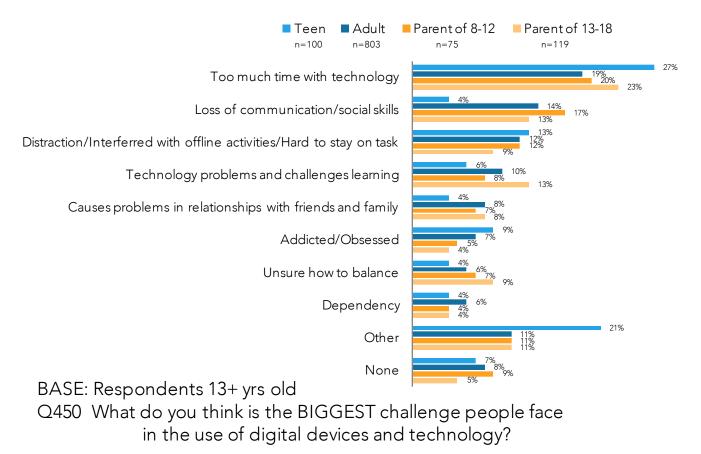
BASE: All Respondents

Q430 Have you had a challenging or difficult situation balancing the use of digital devices and technology?

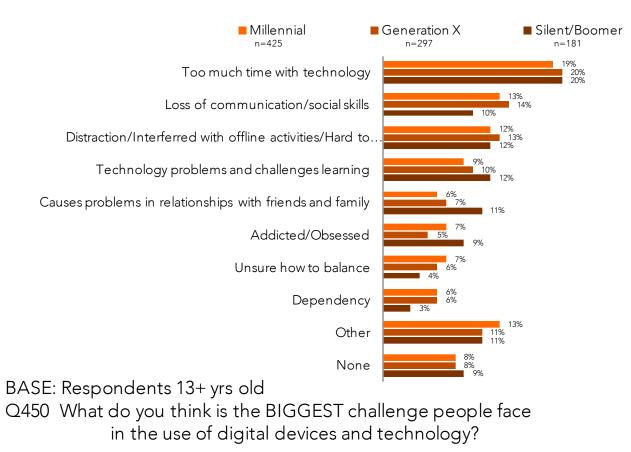
BASE: Had a challenging or difficult situation

By Age

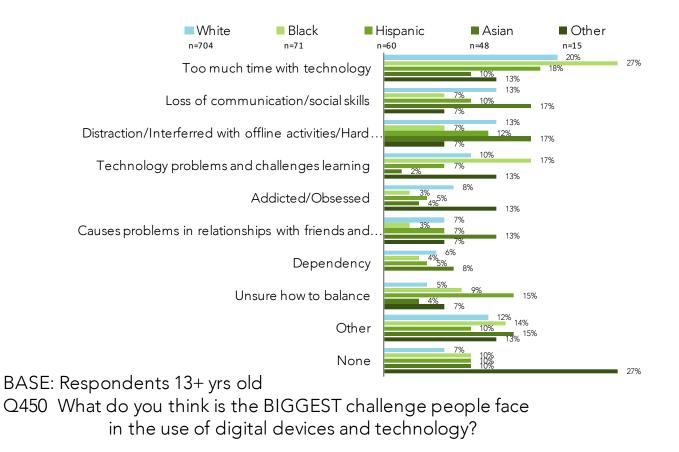
BIGGEST Challenge is Too Much Time with Technology



BIGGEST Challenge is Too Much Time with Technology



BIGGEST Challenge is Too Much Time with Technology



A Majority of People Seek out the Internet as an Information Source for Balancing Tech but Tweens Seek out Family/Parents

Tween (8-12 yrs old)	Teen (13-17 yrs old)	Adult (18+ yrs old)	Parent of 8-12	Parent of 13-18
77% Family/Parents	61% Internet	67% Internet	71% Internet	67% Internet
52% Internet	44% Family/Parents	32% Family/Parents	37% Family/Parents	28% Family/Parents
33% School	30% Friends	28% Friends	32% Friends	25% Friends
21% Friends	15% School	12% Media	13% Media	12% Media
	13% Media		12% Doctor	11% Doctor
	13% Doctor			
	11% Library			
	11% Business			
n=100	n=100	n=803	n=75	n=119

BASE: All Respondents

By

Age

Q460 Where would you go to gather information on balancing

the use of digital devices and technology?

By Generation

Information Source for Balancing Tech

Homelander (<10 yrs old)	Millennial (11-33 yrs old)	Generation X (34-54 yrs old)	Silent/Baby Boomer (55+ yrs old)
73% Family/Parents	69% Internet	70% Internet	54% Internet
44% Internet	42% Family/Parents	31% Family/Parents	25% Family/Parents
38% School	31% Friends	28% Friends	23% Friends
22% Friends	13% Media	14% Media	10% Library
11% Library	12% Doctor	10% Doctor	
		10% Library	
n=63	n=462	n=297	n=181

BASE: All RespondentsQ460 Where would you go to gather information on balancing the use of digital devices and technology?

By Ethnicity

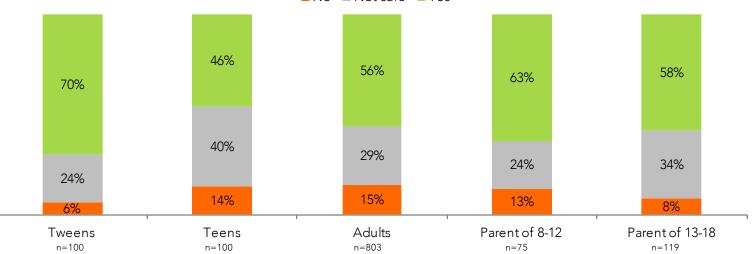
Information Source for Balancing Tech

White	Black	Hispanic	Asian	Other
64% Internet	74% Internet	61% Internet	76% Internet	71% Family/Parents
37% Family/Parents	38% Family/Parents	35% Family/Parents	34% Family/Parents	54% Internet
28% Friends	26% Friends	32% Friends	22% Friends	25% School
11% Media	21% Media	12% School	12% Media	21% Friends
11% Doctor	11% Library	10% Doctor	10% Business	
10% Library	11% School			
n=779	n=76	n=69	n=50	n=24

BASE: All RespondentsQ460 Where would you go to gather information on balancing the use of digital devices and technology?

Tweens Most Likely to Report Healthy Level of Device Use

Do you think your digital device and technology use is healthy?



■No ■Not sure ■Yes

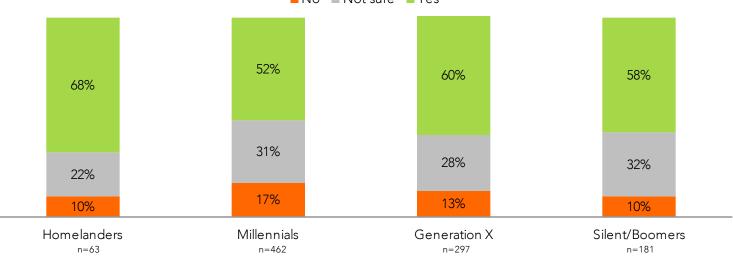
*Self-Reporting

Q470 Do you think your digital device and technology use is healthy?

By Generation

Homelanders Most Likely to Report Healthy Level of Device Use

Do you think your digital device and technology use is healthy?



■No ■Not sure ■Yes

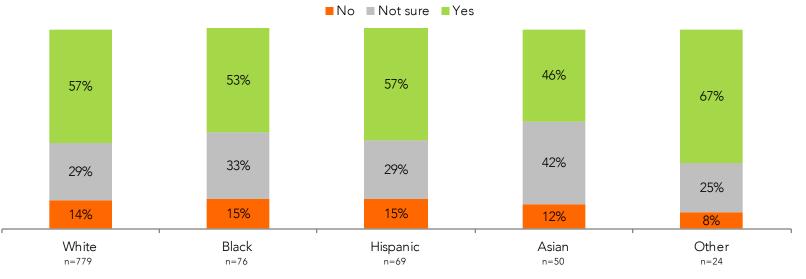
*Self-Reporting

Q470 Do you think your digital device and technology use is healthy?

By Ethnicity

About Half Report Healthy Level of Device Use

Do you think your digital device and technology use is healthy?

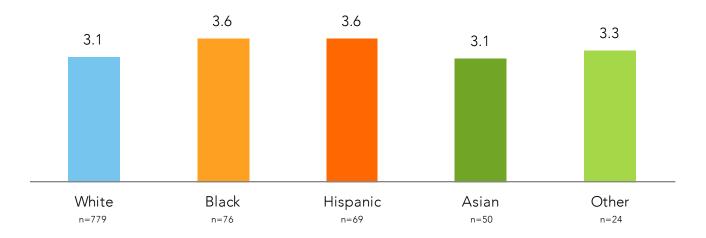


*Self-Reporting

Q470 Do you think your digital device and technology use is healthy?

Household Size by Ethnicity

Average Number of People in Household



Q640 Including yourself, how many people live in your home?

APPENDIX

Demographic Data

Gender	Tween	Teen	Adult
Male	52%	51%	50%
Female	48%	49%	50%
Age			
8-12	100%	-	-
13-17	-	100%	-
18-24	-	-	14%
25-34	-	-	29%
35-44	-	-	19%
45-54	-	-	15%
55-64	-	-	15%
65+	-	-	8%
Mean	9.9	14.9	40.7
Region			
Northeast	15%	20%	18%
Midwest	22%	17%	22%
South	40%	41%	39%
West	23%	22%	21%

Ethnicity	Tween	Teen	Adult
White	75%	65%	80%
Black	5%	17%	7%
Hispanic	9%	7%	7%
Asian	2%	9%	5%
Mixed	8%	2%	1%
Other	1%	*	1%
Education			
1 st -5 th grade	65%	1%	-
Middle School	23%	16%	-
Jr. High	5%	21%	1%
High School	-	53%	28%
Trade/Vocational	-	-	11%
2-yr/Jr. College	-	-	17%
4-yr/University	-	-	25%
Graduate degree	-	-	15%

Income	Tween	Teen	Adult
<\$50,000	24%	32%	45%
\$50,000+	72%	34%	50%
Decline	4%	34%	6%
Employment			
Employed FT/PT	-	-	59%
Student	-	-	5%
Retired	-	-	15%
Stay home	-	-	11%
Other	-	-	9%
Marital			
Married	-	-	49%
Single	-	-	30%
Wid/Sep/Div	-	-	11%
Living w/partner	-	-	10%
People in HH			
Mean	4.3	4.3	2.9

Silent Generation (1925-42)

The Silent Generation (born 1925-42) grew up as the seen-but-not-heard Li'l Rascals of the Great Depression and the Shirley Temples of World War II. They were the least immigrant generation in American history. They came of age just too late to be war heroes and just too early to be youthful free spirits. Instead, they became, like John Dean, "Rebels Without a Cause," part of a "lonely crowd" of risk-averse technicians in an era in which conformity seemed to be a sure ticket to success. A vast new gap emerged between women's and men's education as this generation became the youngest mothers and fathers in American history, joining older G.I.s in gleaming new suburbs. They rode the wave of institutional civic life and conventional culture established by G.I.s as grayflannel, "How to Succeed in Business Without Really Trying "corporate Source: saeculumresearch.com careerists.

lead of Bob Dylan ("I was older than that then, I'm younger than that now"). They became the leading civil rights activists, rock 'n' rollers, antiwar leaders, feminists, public interest lawyers, and mentors for young firebrands. They were America's moms and dads during the divorce epidemic. They rose to political power after Watergate, with their Congressional leadership marked by a push toward institutional complexity and vast expansion in legal process. They are the first generation never to elect a U.S. President, and the first never to have a Chief Justice of the U.S. Supreme Court. As elders, they have focused on discussion, inclusion, and process, but not on decisive action. Having benefited from the collective upward mobility of the G.I. economic machine and institutional safety nets like defined-benefit pensions, they are spending elderhood with a hip style, generous benefits and higher living

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Generation X (1961-81)

Generation X (born 1961-81) grew up as the children of the Consciousness Revolution, an era when the welfare of children was not a top social priority. They learned young to distrust institutions, starting with the family, as the adult world was rocked by the sexual revolution, divorce epidemic, and a shift to a more explicit pop culture. As women entered the workplace before childcare was widely available, many endured a latchkey childhood. Their school achievement leveled out, yet The Nation At *Risk* report accused them of being "a rising tide of mediocrity." Come the 1980s, their new cultural statementship-hop, grunge, heavy metal, altrock—revealed a hardened edge. In the late 1980s, the crime rate surged.

As young adults navigating a sexual Sobreet takecalamanesearelf.com/DS and blighted courtship rituals, Xers dated institutional strength of family that they missed in their own childhood. In jobs, they embrace risk and prefer free agency over loyal corporatism. Through the '90s, they faced a *Reality* Bites economy of declining youngadult living standards—a consequence masked by the phenomenal wealth of young movie stars, athletes, and dotcom phenoms. They responded by becoming the greatest entrepreneurial generation in U.S. history. They have also emerged as the most immigrant generation born in the 20th century. Politically, they lean toward nonaffiliation and tend to see volunteering as more effective than voting. They were slow to come to public office, but they are now arriving with a typical brand of get-itdone pragmatism, from President Obama's "post-Boomer" politics to the "young guns" who entered Congress in 2011.

The Boom Generation (1943-60)

The Boom Generation (born 1943-60) grew up as indulged youth during the post-World Warll era of community-spirited progress. Parents, educators, and leaders were determined to raise young people who would never follow a Hitler, Stalin, or Orwellian Big Brother. As kids, Boomers were the proud creation of postwar optimism, Dr. Spock rationalism, and Father Knows Best family order. Coming of age, they loudly proclaimed their contempt for the secular blueprints of their parents. They scorned institutions, civic participation, and team-playing while pushing towards inner-life, self-perfection, and personal meaning. There was quite a bit of screaming—on the streets, in dorms, and in families. Crime rates, substance abuse, and sexual risktaking all surged, while academic Source: saeculumresearch.com achievement and SAT scores started to fall. The Consciousness

challenging the "glass ceiling" in the workplace. Both genders designated themselves the arbiters of the nation's values, crowding into such "culture" careers as teaching, religion, journalism, law, marketing, and the arts. During the 1980s, they were the "yuppie" individualists in an era of deregulation, tax cuts, and entrepreneurial business. Ever since they came to power in the 1990s, Boomer political leaders have trumpeted a "culture war," touted a divisive "politics of meaning," and waged scorched-earth political battles. Their two Presidents (Clinton and Bush) each attracted powerful enmities among their peers. As family heads, Boomers have developed very close individual relationships with their children, to the point of hovering. From first-tolast cohort, they have been a generation of declining economic prosperity on average and of rising

The Millennial Generation (1982-2004)

The Millennial Generation (born 1982–2004) arrived after the Consciousness Revolution, when "Baby on Board" signs first began to appear in car windows. As abortion and divorce rates ebbed, the popular culture began stigmatizing hands-off parenting styles and recasting babies as special. Child abuse and child safety became hot topics through the 1980s, while books preaching virtues and values became bestsellers. By the mid-'90s, politicians were defining adult issues (from tax cuts to internet access) in terms of their effects on children. Hollywood replaced cinematic child devils with adorable children who made adults better people. The "Goals 2000" movement demanded improved student behavior and achievement from the high school Class of 2000. Educators spoke of standards, cooperative learning, and Source sachulurgresegrett Brehind.

Millennials have become a generation of improving trends, with consistent decreases in high-risk behaviors. Rates of tobacco and alcohol use, violent crime, pregnancy, and suicide are all way down among today's teenagers, while SAT and ACT scores have been rising. As they graduate into the workplace, record numbers are gravitating toward large institutions and government agencies, seeking teamwork, protection against risk, and solid work-life balance. The youth culture is becoming less edgy, with a new focus on upbeat messages and big brands, and more conventional, with a resurgence of "oldies" and "remakes." Their close relationships with their parents and family members are carrying over into their young adult lives.

Homeland Generations (born 2005 -)

The Homeland Generation (born 2005-?) are arriving now in America's nurseries. time, public attention to and These will include the babies born between now and the mid 2020s. Their always-on-guard nurturing style will be set substantially by Gen-X parents, legislators, and media producers. Already gaining a reputation for extreme sheltering, Xer stay-at-home dads and "security moms" will not want to see their own children relive the Dazed and Confused childhood they recall from the 1960s and '70s. The protective rules initiated for Millennials will become customary, no longer controversial. Homelanders will receive "total situation" childcare, surveilled by digital-mobile technology, emotionally screened by psychological software, and guarded from

inappropriate media through entertainment controls. At the same celebration of children, which peaked with Millennials, will begin to drop. The adult world will turn its attention to larger public problems as structured methods and institutions point out the "easy way" to raise kids and keep them safe.





iKeepSafe[™] Balance Curriculum Matrix K-12 BEaPRO[™]

Overall project goal

To develop a guide for building effective curricula that teach children (K-12) the skills for maintaining "Life Balance" in media and online environments.

Approach to developing the guides

To identify the most effective approaches to addressing these issues, we reviewed the literature that assesses effectiveness of various internet safety, risk prevention, and social skills curricula. This literature identifies key components of curricula that successfully achieved their goals.

We reviewed several meta-analyses and individual studies that identify elements of effective curricula aiming to teach the skills of interest, including social skills²⁻⁴ which we use in our Life Balance guide.

1. Focus on the underlying issues

Research shows that effective Internet safety messages address the underlying issues that contribute to many of the known risky and anti-social behaviors on the Internet,¹ rather than simply telling children to avoid problematic behaviors. Once those issues are identified, research recommendations indicate the importance of helping children build the skills and competencies they need to address those issues. For example, children who struggle with interacting in positive ways online due to difficulty managing their anger can learn anger management techniques, rather than simply being told to be nice.

2. Define the Program Logic¹

Reviewers recommend defining "the research-based link between the problem, intervention, and prevention or reduction of the problem."¹ They offer an example of such program logic as follows:

"A program targeting cyberbullying might begin by researching risk and causal factors related to bullying and cyberbullying (e.g., anger management problems, social pressure

To Teach Youth a Healthy Cyber Balance K-12

Learn and Teach iKeepSafe Balance K-12 Curriculum Matrix iKeepSafe.org

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