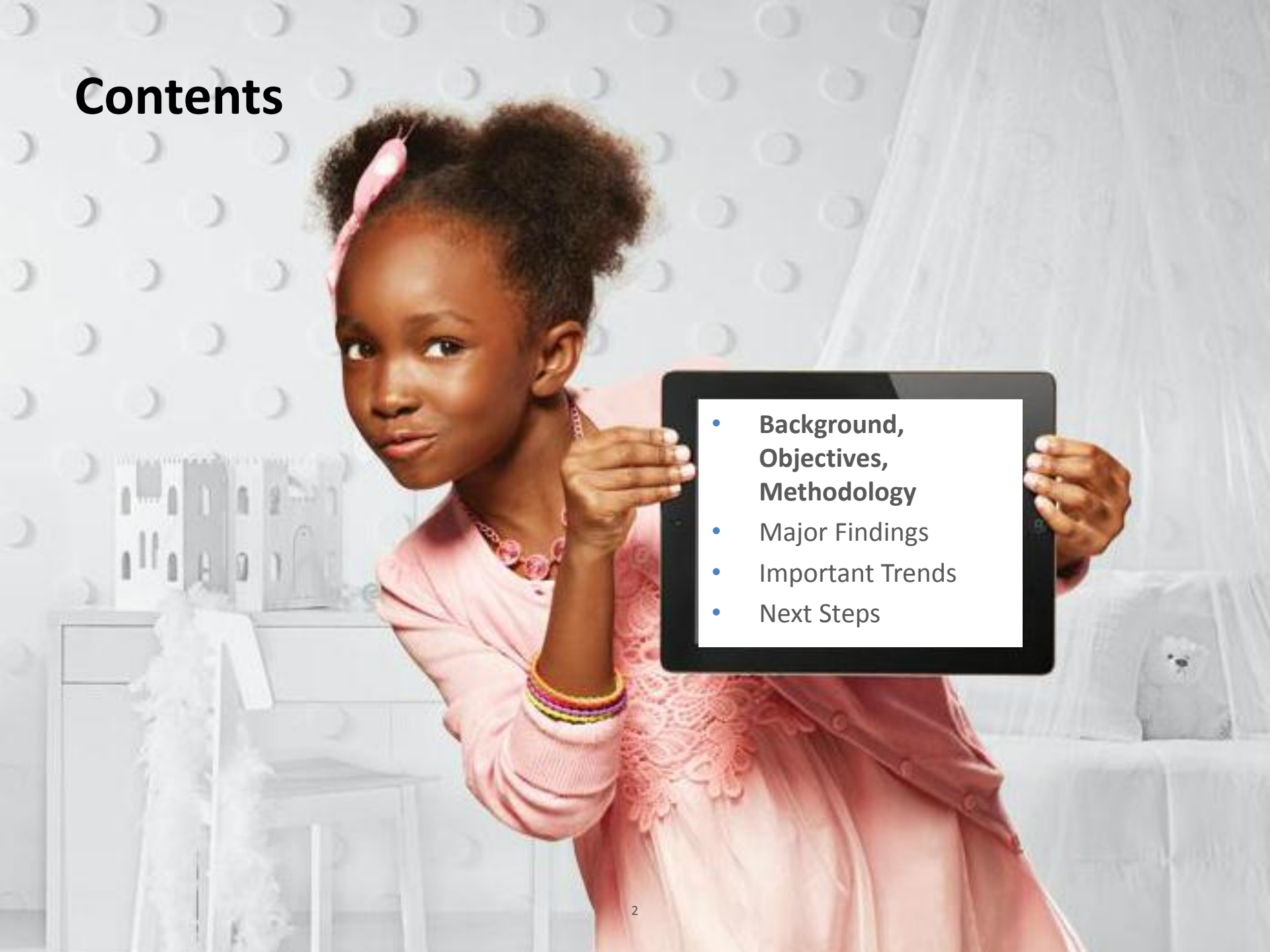




2014 Teen Internet Safety Survey

Conducted by The Futures Company

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Background + Objectives

Cox's commitment to Online Safety



- For more than 10 years, Cox has **conducted research on youth habits online**, helping parents understand how Internet use changes over time.
- This research was designed to develop a better understanding of teen behavior online, including:
 - Experiences with cyberbullying
 - Online behaviors and attitudes
 - Social media network usage and online gaming
 - Parental controls and monitoring of online behaviors
 - Types of risks teens may take, or encounter, online

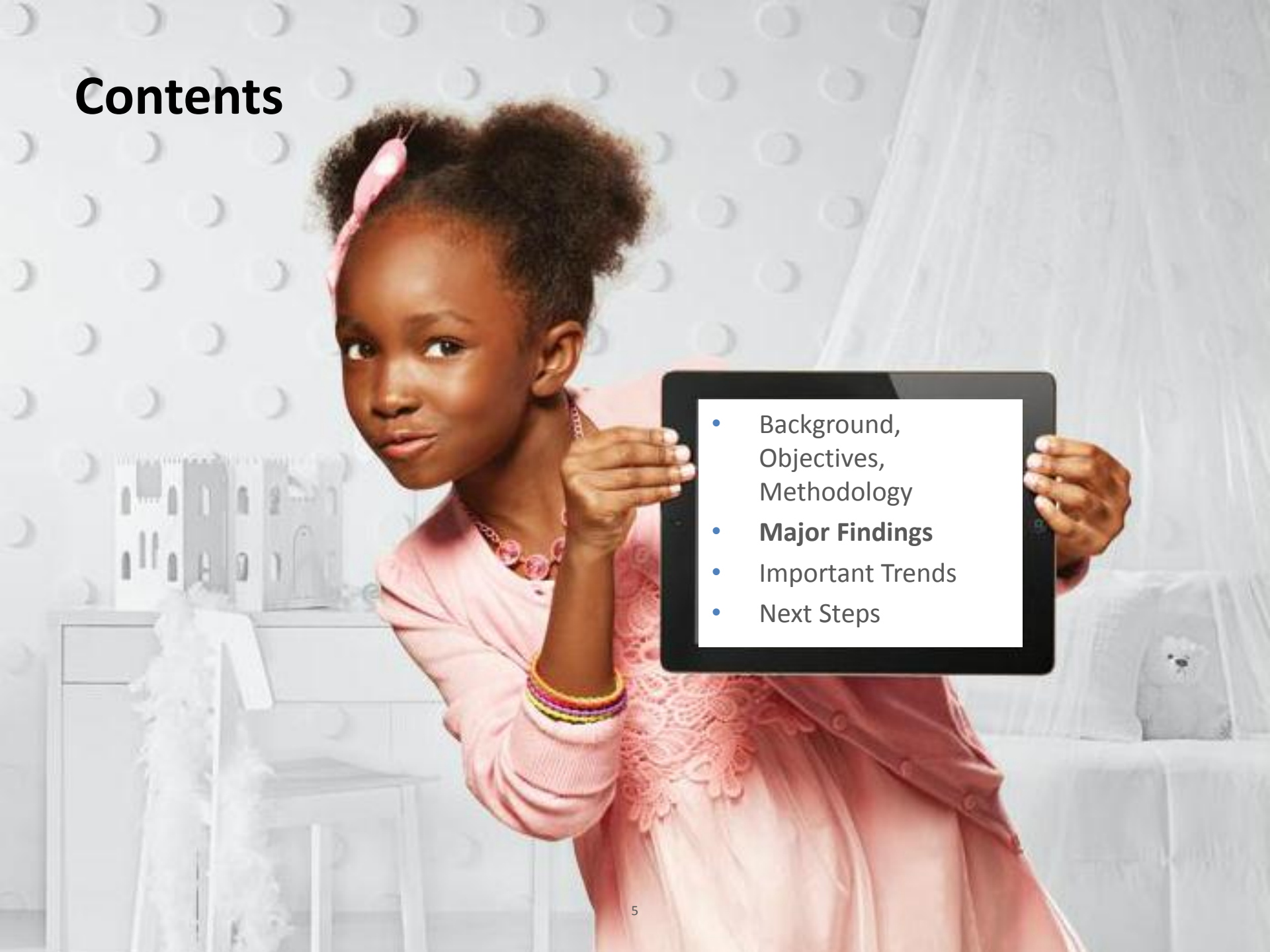


Methodology

Cox Internet Safety Survey Sample

- Surveyed a total of 1,301 teens between 13-17 years old
- Interviews were distributed evenly by age and gender
- Increased focus to include more diversity in our survey, with 16% African-American and 10% Hispanic respondents.
- Interviews were conducted across 13 states, including Arizona, Arkansas, California, Connecticut, Georgia, Kansas, Louisiana, Nebraska, Nevada, Oklahoma, Rhode Island and Virginia
- Each interview was approximately 10 minutes in length

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Major Findings

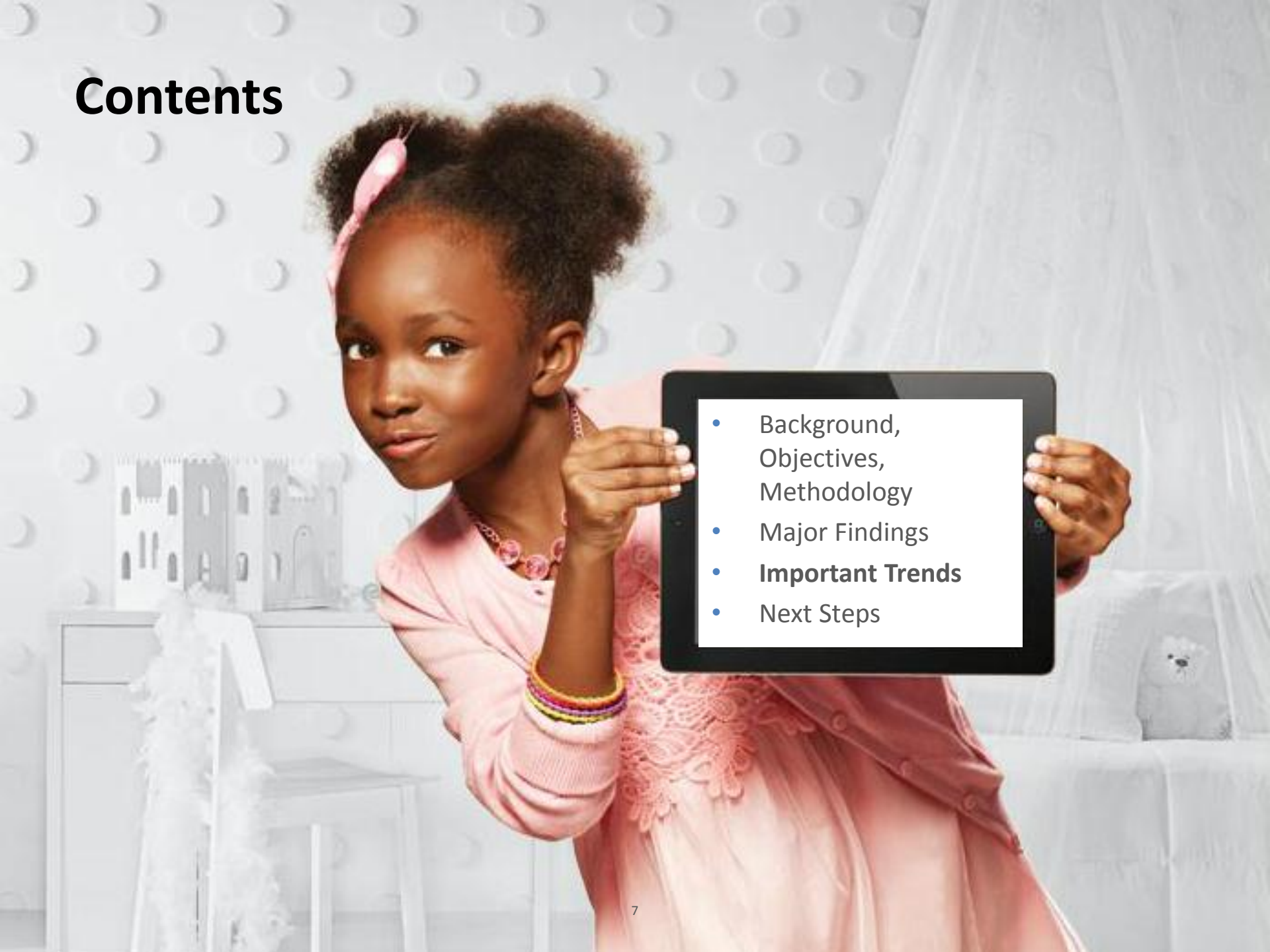
Cox 2014 Internet Safety Survey



Top Three Points in Survey Results:

1. More than half of teens have witnessed cyberbullying on social media.
2. Smartphones are quickly becoming the go-to device for online activity.
3. Nine in 10 teens say their parents have talked to them about online safety.

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Important Trends: Cyberbullying

2014 Cox Internet Safety Survey

Cyberbullying is still prevalent: **54% of teens surveyed have witnessed online bullying**

- 39% on Facebook
- 29% on YouTube
- 22% on Twitter
- 22% on Instagram



Important Trends: Cyberbullying

2014 Cox Internet Safety Survey

- 24% of teens reported being bullied online (compared to 31% last year)
- 60% of teens who admit to being bullied online have told an adult (compared to 40% last year)



Important Trends: Cyberbullying

2014 Cox Internet Safety Survey

- **Teens who report being bullied say they it was because of their:**
 - 61% appearance
 - 25% academic achievement/intelligence
 - 17% race
 - 15% sexuality
 - 15% financial status
 - 11% religion
 - 20% other
- **Of those who witness bullying, 35% report trying to help in some way.**



Important Trends: Time spent online

2014 Cox Internet Safety Survey



Teens report spending several hours a day online via many devices:

- On average, teens spend **5 hours and 38 minutes online every day**
- Nearly *half* of that time is spend playing online games
- Numbers vary slightly amongst different demographics
 - Younger teens spend slightly less time at 5 hours and 15 minutes
 - On average, male teenagers spend an hour more than female teens playing online games

Important Trends: Devices

2014 Cox Internet Safety Survey



99% of teens access the Internet via a “Mobile” Device:

- 81% Smartphone (an increase of 10%)
- 84% Laptop
- 61% Tablet (an increase of 15%)
- 43% MP3 Player with Internet access
- 40% Handheld Gaming Device with Internet Access
- 32% E-Reader with Internet Access

Important Trends: Interacting Online

2014 Cox Internet Safety Survey

- 92% are social network users and share online:
 - Photos or videos (74%)
 - Age (47%)
 - Risky online comments or posts (24%)
 - Physical location (21%)
 - Cell phone number (15%)
 - Address (9%)
- Nearly 3 in 4 online gamers interact with other gamers online
 - Web chat (50%)
 - Voice chat (44%)
 - Web cam (20%)
- 18% have considered meeting with someone in person whom they first met online.
 - Of these, 58% have actually met up with someone in person.



Important Trends: Parent Monitoring

2014 Cox Internet Safety Survey

With the increase of teens using mobile devices and social media, we also see an increase in parent discussions about Internet Safety.



9 in 10 teens say their parents have talked to them about Internet safety.

Among those, 86% say the talk has occurred within the last year.

However, nearly half (49%) of teens claim their parents do nothing to monitor their devices.

Important Trends: Hiding Content

2014 Cox Internet Safety Survey

More parents are working to protect their teens online, however:

- Nearly half of teens admit to taking action to hide their online behavior from parents
- **46%** have cleared their search history and/or cookies on their browser
- **1 in 5** have used a private browsing feature so their parents can't see the sites they've visited
- A few (8%) have disabled the software their parents installed on the internet device



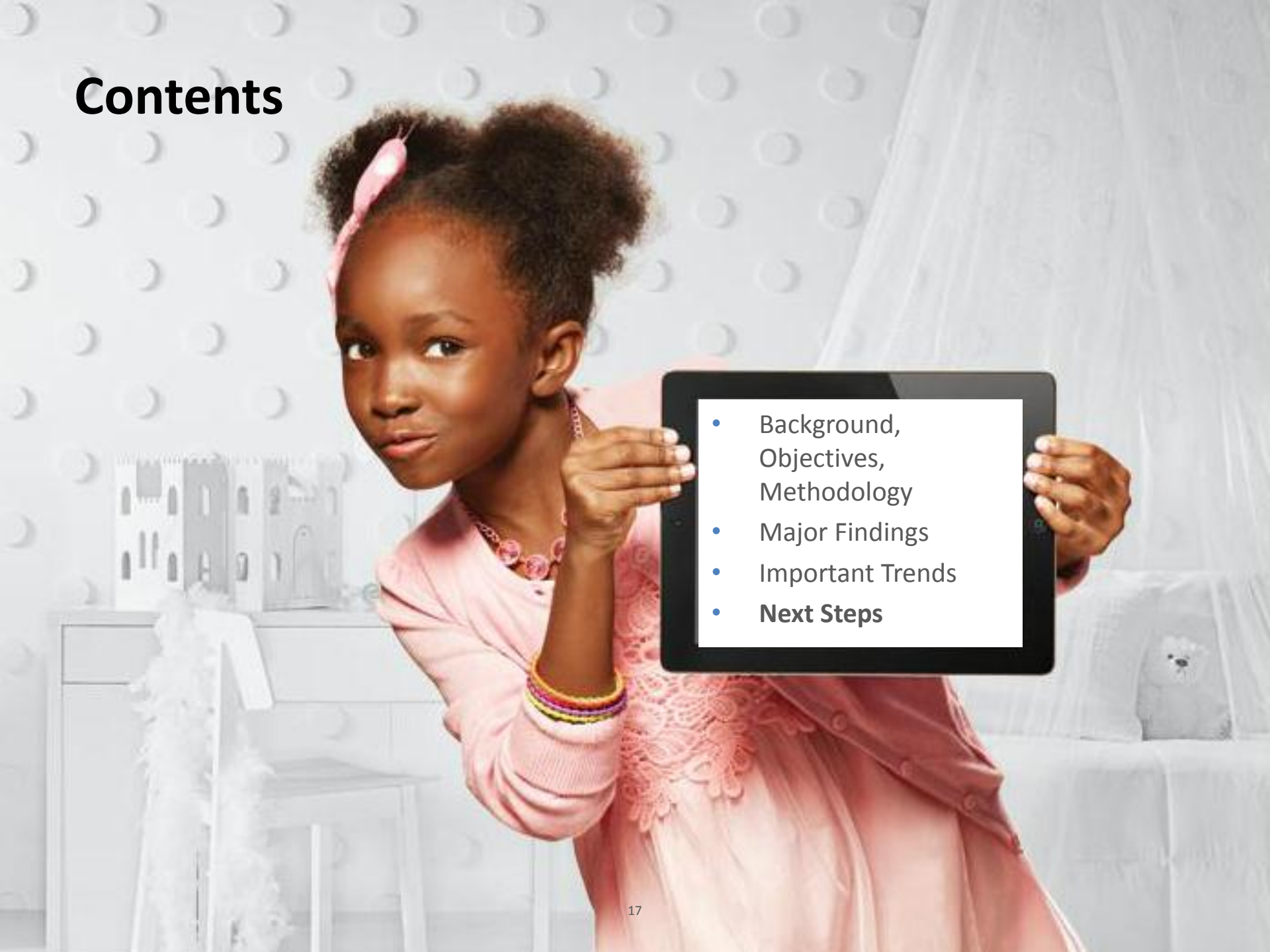
Important Trends: Physical Safety at Home

2014 Cox Internet Safety Survey

- 40% are alone for more than 3 hours per week
- Only 43% say a security system is installed in their home
- Nearly half (46%) without a security system say they would feel safer at home with a security system
- 14% of teens report friends have invited someone over that they had only met online



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Next Steps

Keeping Teens Safer Online

Dealing with Cyberbullying:

- Encourage parents and guardians to spend 15 minutes per day talking to their kids. (The KnowBullying App has conversation starters.)
- Teach healthy ways to deal with bullying, whether they are the victim or a witness.
- Encourage teens to take the anti-bullying pledge.



This pledge and other helpful tools are available at **cox.com/takecharge**

Next Steps

Keeping Teens Safer Online

- Learn about ALL the devices your children use to connect to the Internet, including smartphones and mobile devices.
- Use parental control software to reinforce house rules for Internet use.
- **Cox Security Suite and McAfee Family Protection:**
 - Free security software valued at \$169 included with all CHSI packages
 - Keep up to 5 computers safe from spam, hackers, viruses, spyware
 - Keep your kids safe online with McAfee Family Protection. It's the easiest, most complete way to fight against inappropriate content, social network stalkers and other threats. Plus, you can set up automatic alerts to be sent to you when potential dangers arise. All for free!
 - Thwart online identity theft, remove viruses and reinforce your firewall
 - Downloading is easy, visit www.cox.com/security





Questions, comments, suggestions?

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