Digital Childhoods

Defining opportunity spaces for healthier digital habits in the child–parent ecosystem.

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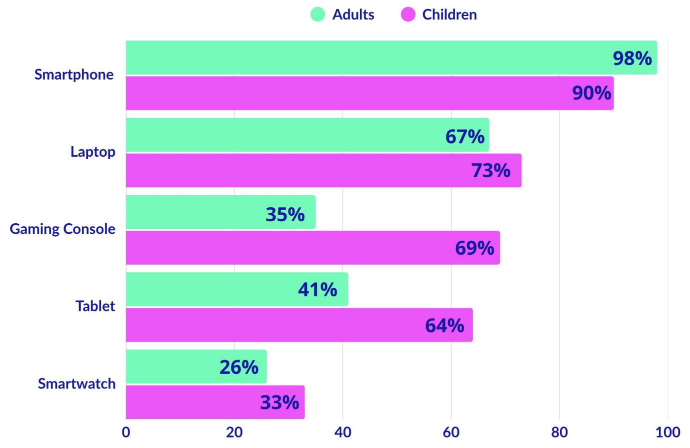
Device Access of Children

Device Access of Children vs Adults

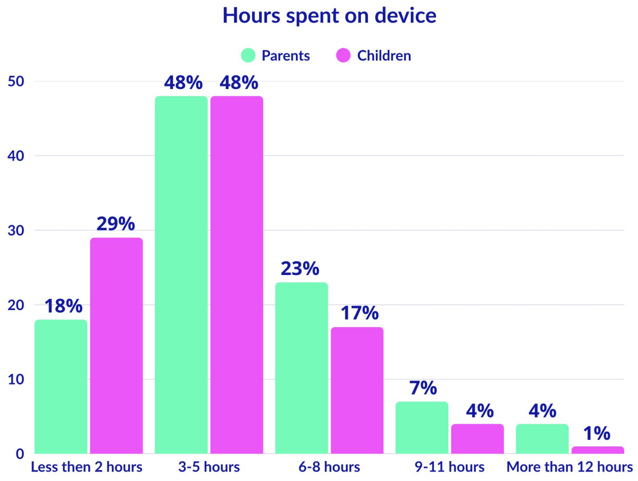


**children ages 9-13*

Children now have nearly the same or more level of device access as adults

Almost half of both parents and children spend 3–5 hours on screens daily

Hours spent on device children vs adults



**children ages 9-13*

46%
of children are on social media

90%
of children have access to smartphones

69%
of children have access to a Gaming Console

The Digital Childhood & Well-being Industry

"Children blur the line between their real life and the life they see online… They see young people showing success or a luxurious lifestyle and wonder why they can't achieve that."

— Prof. Vaughan Coleman

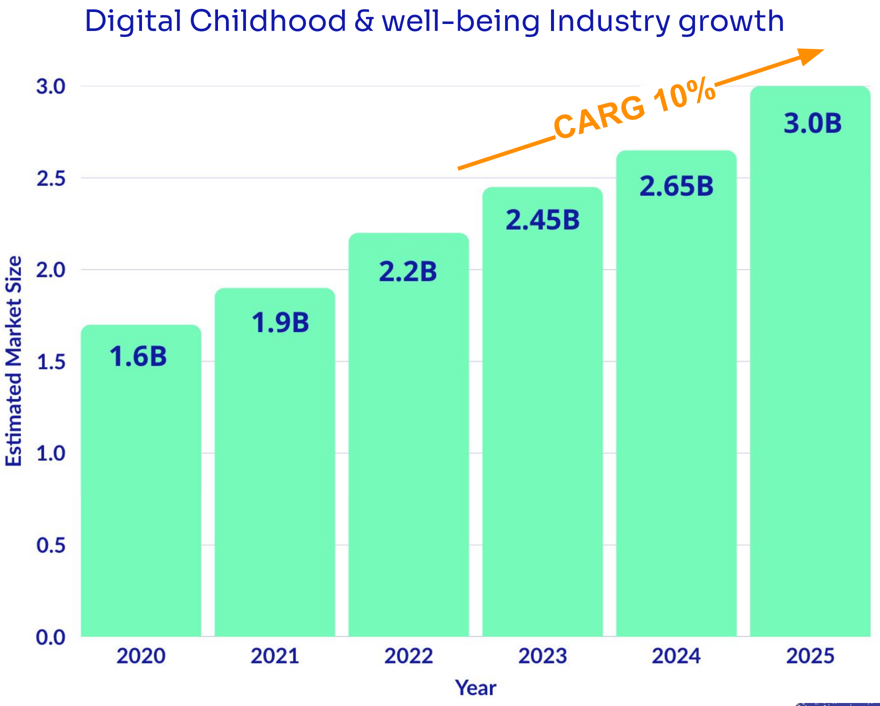
Key Trend Drivers

Earlier & Deeper Digital Immersion

Mental-Health & Social Concerns

Rise of AI Companionship

Regulatory & Policy Momentum



Key Segments

Around 63% of parents use some form of digital monitoring tool for their children, including apps and device controls, according to a 2023 study

Parental Monitoring & Control Tools

Current apps enable real time monitoring & control (screen-time, content filters)

AI Literacy

Schools are starting to recognize AI literacy as a critical skill

Creating Digital Balance

Experts recommend self-regulation strategies over strict device bans

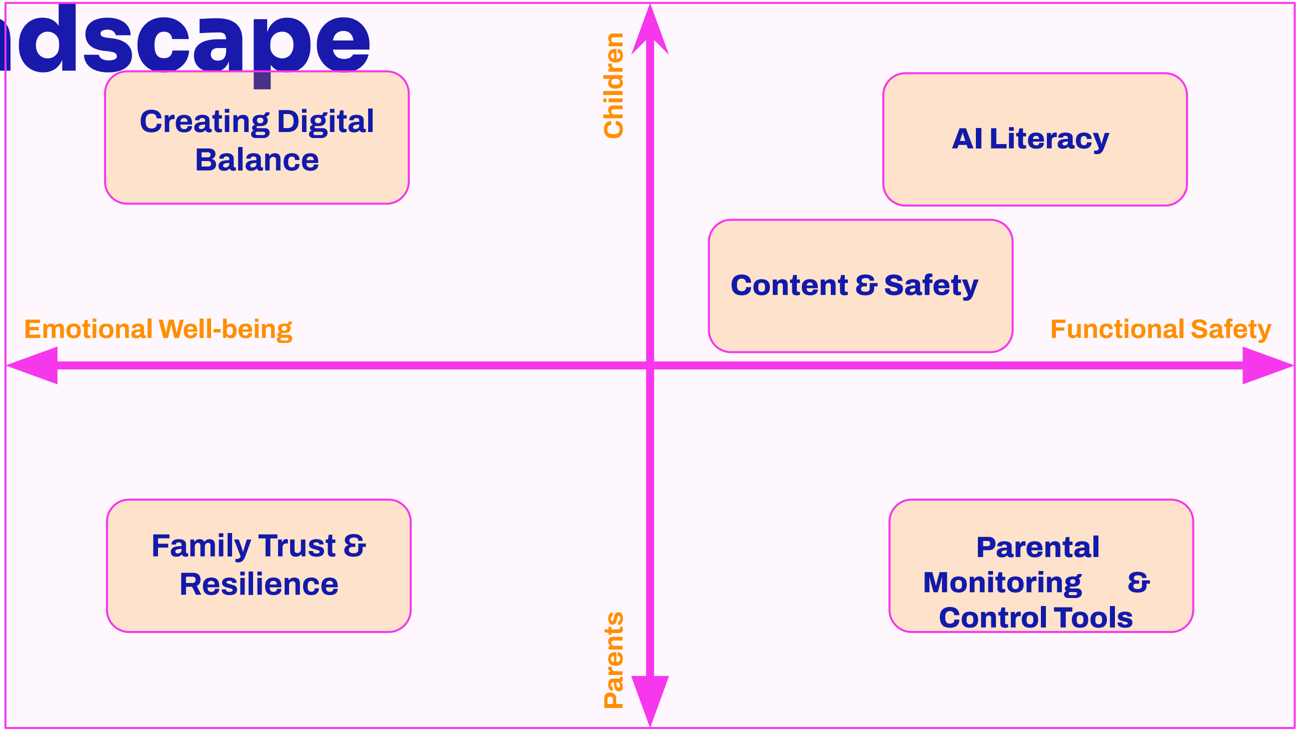
Content & Safety

Parental concerns about influencers, content, & grooming call for education & awareness

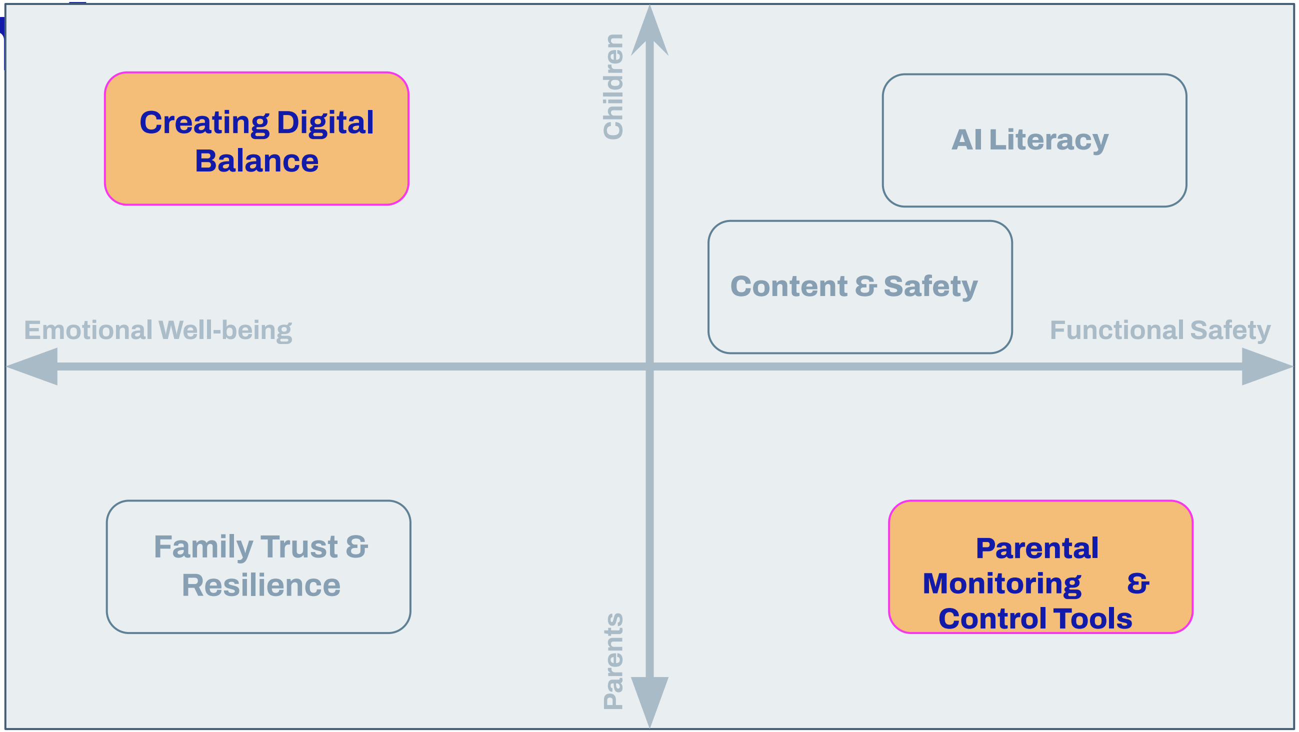
Family Trust & Resilience

Community connection & open dialogue boost family resilience

Understanding the Landscape



Understanding the Lan



Methodology

Step 1: Industry Research

- Researched the **digital childhood and family well-being** industry to identify key trends and gaps

Step 2: Conduct Interviews

- Interviewed **10 individuals** across **three key perspectives** to understand how families, educators, and professionals experience children growing up with AI

Step 3: Draw Insights

- Organized interview notes and highlighted **recurring themes and insights**

Step 4: Bring It All Together

- Combined research, interview findings, and intuition to define two clear **“Where to Play”** areas

Key Perspectives

Parents & Families

Mental Health & Support Professionals

Education Sector

Where To Play #1

Creating Digital Balance

There is a need to promote healthy digital habits among children

Digital well-being is about balance, not restriction

“We can’t stop technology, but we can help children use it with awareness, to enhance, not replace, their real lives.”

— *Prof. Vaughan Coleman*

Online confidence surpasses real-life confidence

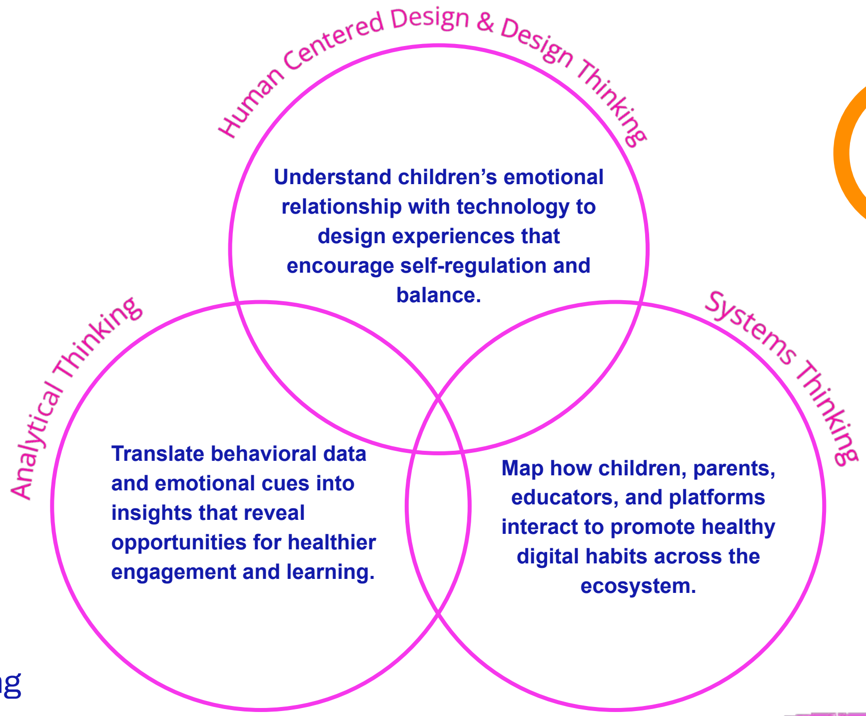
“Sometimes she’s more confident online than she is in person — she’ll post and get validation there.”

— *Parent (Teen Daughter)*

Superficial connections replacing genuine bonds

“It lets them feel supported by others without actually having to be close to each other.”

— *Social Worker*



Concept 1: GoPlay App for Children

Problem

Children **spend excessive time on digital entertainment, leading to disconnection** from real-world play and well-being.

Our Solution

An app that **helps kids pause, play, and reconnect** with the world **beyond the screen**.

Social Anxiety

Digital Isolation

Digital Dependency

Self Confidence

Real Connection

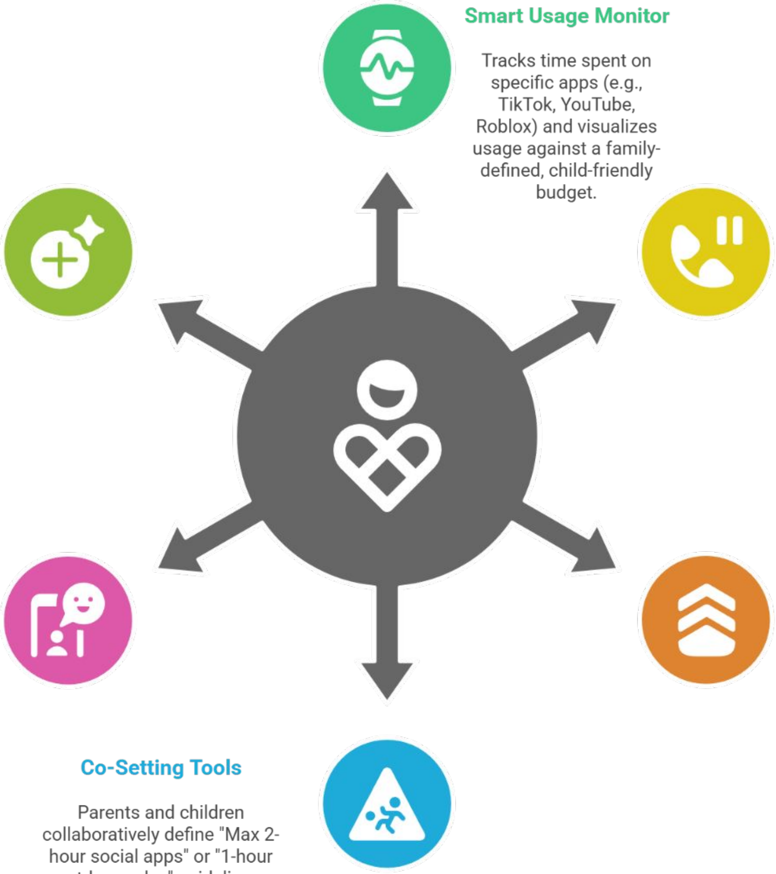
Physical Action

Creative AI Scaffolding

Content-aware notifications (like, "Hey Sam, your creativity score goes up when you take a 20-minute break") rather than generic warnings or guilt trips.

Well-Being Insights

Provides simple, weekly summaries showing the correlation between screen time, mood logs, and offline activities.



Smart Usage Monitor

Tracks time spent on specific apps (e.g., TikTok, YouTube, Roblox) and visualizes usage against a family-defined, child-friendly budget.

Positive Pause Trigger

When a screen-time limit is reached, the app doesn't just lock down—it prompts a brief, mindful break with a question like, "You've been scrolling for 2 hours—how about a 30-minute task outdoors?"

Reward System

Children earn digital badges, sticker credits, or time-bank credit for completing offline tasks (verified by parent confirmation or movement data).

Co-Setting Tools

Parents and children collaboratively define "Max 2-hour social apps" or "1-hour outdoors play" guidelines.

Concept 1

Total Addressable Market

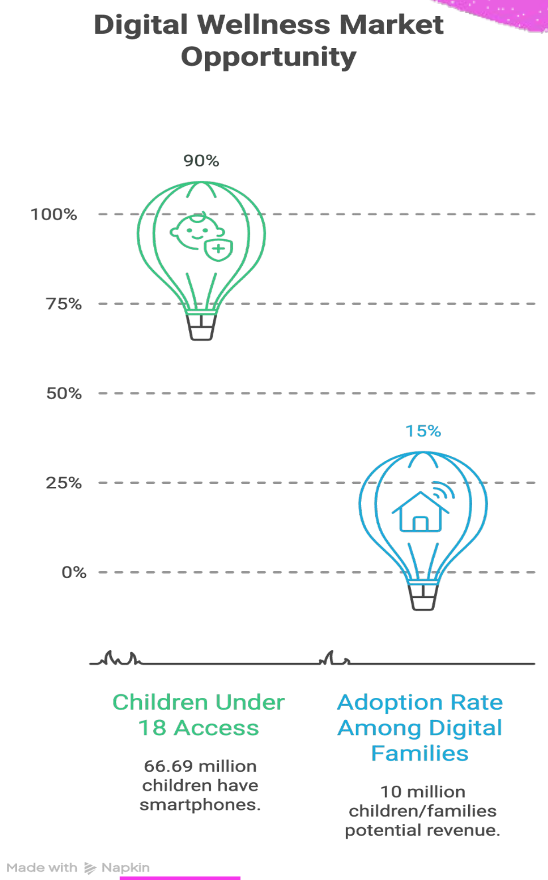
- ★ 74.1 million U.S. children under age 18
- ★ 90% have access to a smartphone
- ★ 66.69 million children with a smartphone
- ★ $150 annual spend on digital wellbeing app

Potential Market Size = $10 billion

Serviceable Addressable Market

- ★ Assuming 15% adoption rate
- ★ Parents adopting for 10 million children
- ★ Assuming each family spends $75

Potential Market Size = $750 million



Where To Play #2

Parental Monitoring & Control Tools

Parents feel trapped between over-control (spying apps) and under-protection (total autonomy)

Balanced tech boundaries are critical

"Don't overly control your child's tech use. Communicate openly and help them understand both the pros and cons."

— *Prof. Vaughan Coleman*

Knowledge is protection

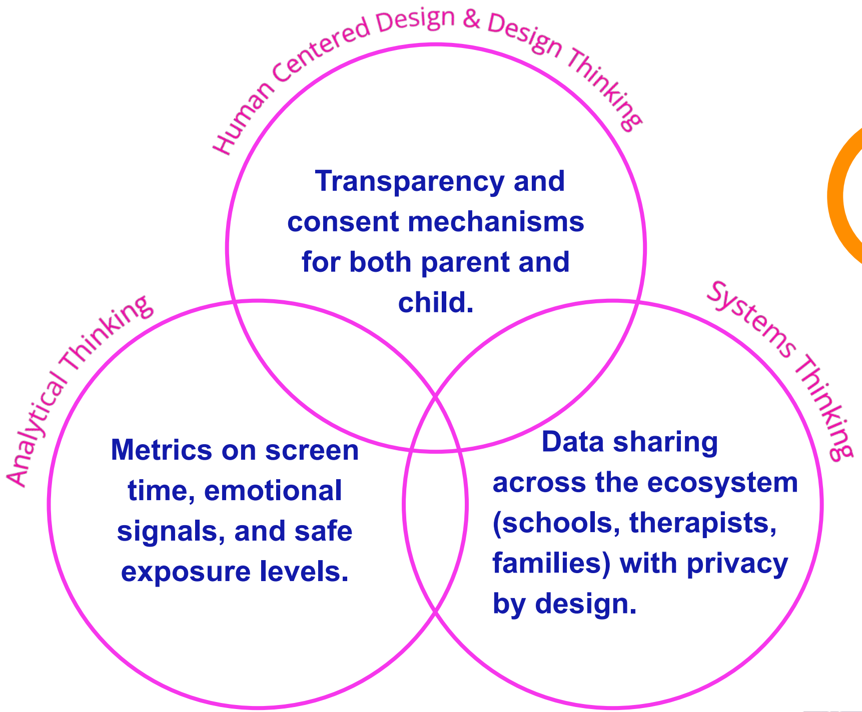
"Informing parents what technology their kid is using at school (officially or unofficially)."

— *Social Worker*

Parents observe direct behavior change from screen time

"Screen time/gaming time is limited because we see a link between increasing screen time and worse behavior."

— *Mother (Pre-teen Son)*



Concept 2: Family Digital Dashboard

Problem

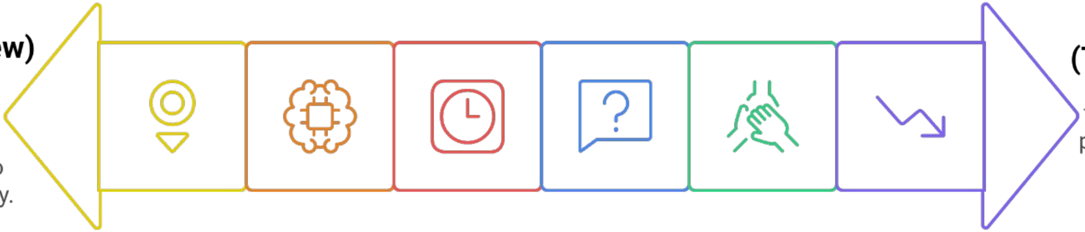
Traditional parental controls breed mistrust. A hands-off approach **leaves parents without insight**. We **need a third way**.

Our Solution

The **Family Digital Dashboard** application replaces **restrictive Control with supportive Co-Regulation**.

Control
(The Parent View)

Based on enforcement, monitoring, and mistrust. Leads to friction and secrecy.



Emotional Translator

Gentle Guidance & Emotional Insight: Summarizes emotional patterns e.g., “Your child felt calm after creative play sessions.” Helps parents connect digital behavior to mood.

Dialogue Starter

Functional Dialogue: Provides context-based nudges like “Ask Alex what they liked most online today,” encouraging open dialogue.

Weekly Reflection Report

Generates co-viewed summaries focused on wins: "Screen time down 10%, confidence up." Celebrates small wins instead of highlighting 'bad behavior.'

Compass of Connection

Shared Visibility & Connection: Displays a simple daily dashboard of device time, app categories, and mood trends visualized through friendly icons (not numbers).

Balance Bar

Replacing Control with Regulation: Suggests balanced routines (“15 min of screen break left today!”) instead of automatic lockouts.

Shared Responsibility Hub

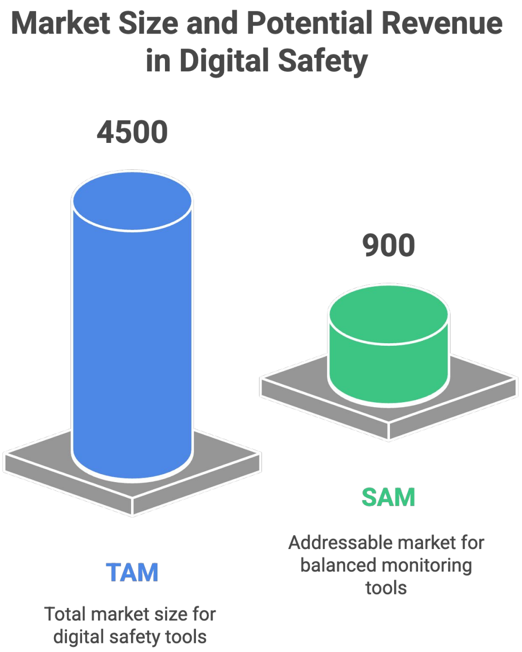
Co-Created Boundaries: Lets families co-create digital goals (e.g., “No phones at dinner” or “30 min creative time”), reinforcing shared responsibility.

Trust
(The Child View)

Based on total freedom, leading to parental anxiety and lack of insight.

THE BRIDGE A foundation built on shared visibility, gentle guidance, and functional dialogue.

Concept 2



Total Addressable Market

- ★ 33 million U.S. households with children
- ★ 90% have access to a smartphone
- ★ 30 million digital households
- ★ $150 annual spend on digital safety tools

Potential Market Size = $4.5 billion

Serviceable Addressable Market

- ★ Assuming 20% adoption rate
- ★ 6 million households adopting
- ★ Assuming each family spends $150

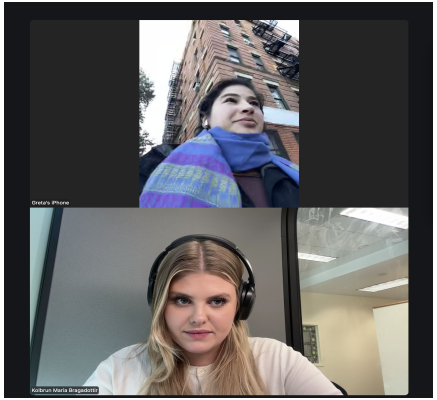
Potential Market Size = $900 million

Thank You!

Appendix

Interview Photos

I forgot to take a picture during my coffee interview with Katherine, the Social Worker, but this was that morning!

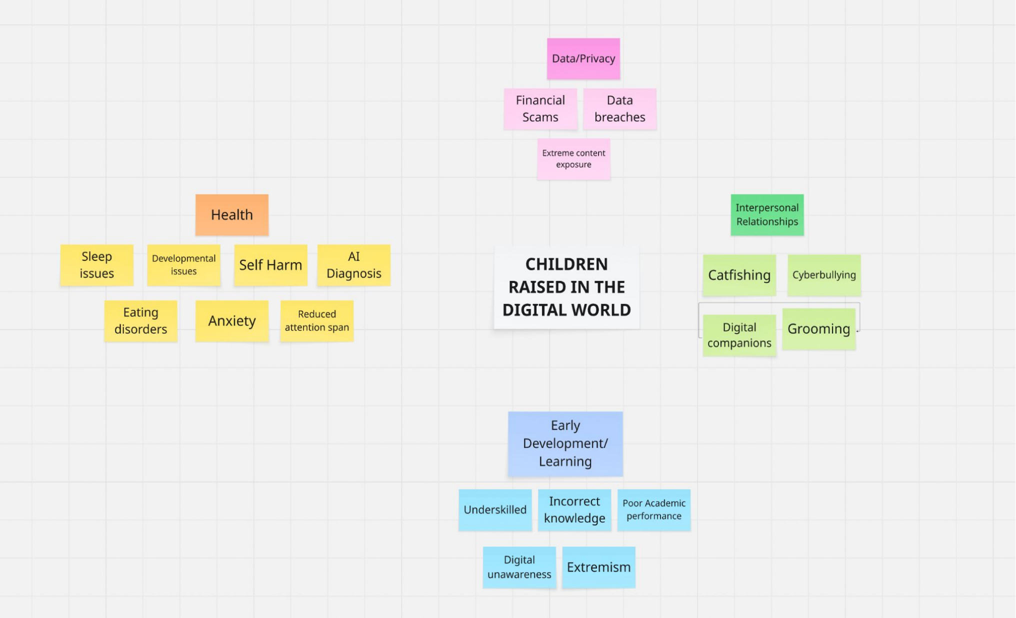


This is Greta

This is Julie

This is Prof Coleman

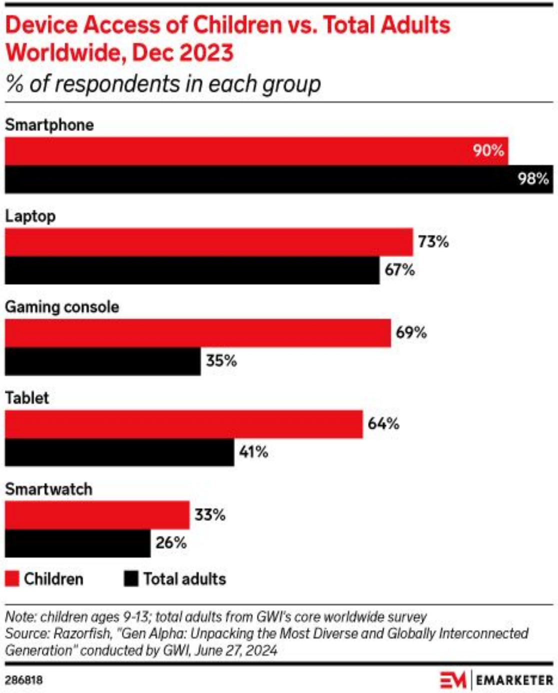
Research Process & Insights

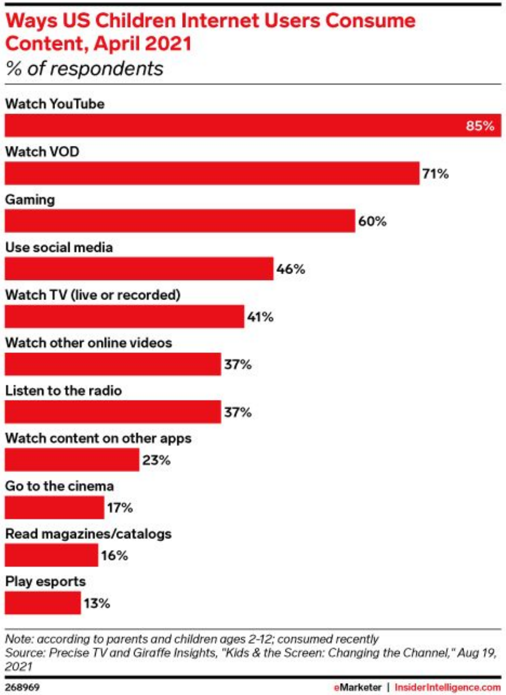


Identified four bigger Areas:

- Mental Health
- Data/Privacy
- Interpersonal Relationships
- Early Development & Learning

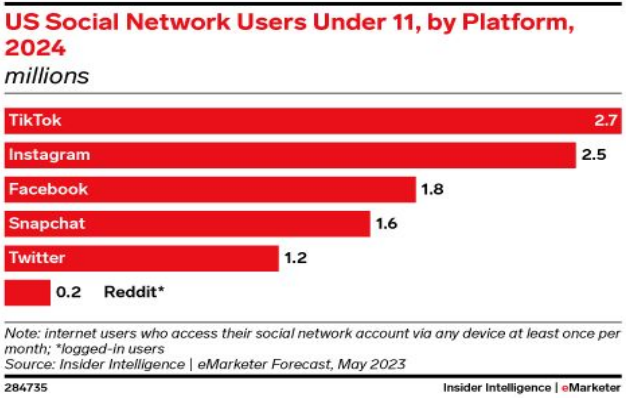
Device Access of Children

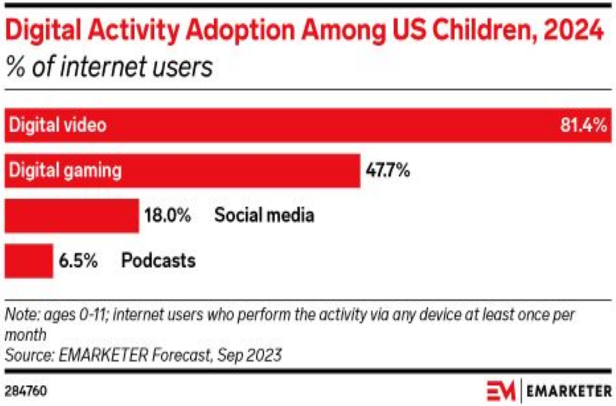


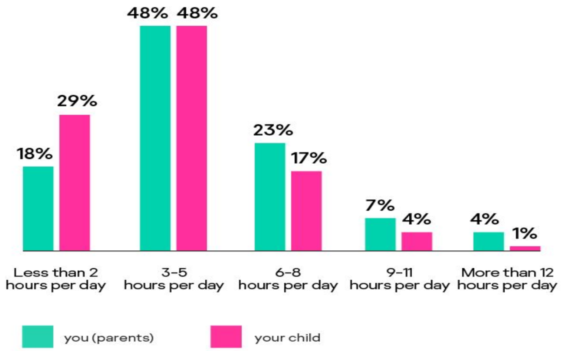


- 90% of Children Worldwide have access to a cell phone
- 85% of US Children Internet Users consume YouTube
- 46% are on Social Media

Digital Activity & Platform Exposure







- 81.4% of Digital Activity is Video
- 47.7% of Digital Activity is Gaming

- 2.7 millions US Social Media users under 11 years are on TikTok

- 48% of Children spent between 3-5 hours on devices

Digital Mental Health Industry

The global digital mental health market is projected to grow from:

- USD 27.8 billion in 2024 to → USD 180.6 billion by 2035
- 18.54% CAGR.

(Market Research Future, 2024)