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Foreword from the Board

Technology is the defining characteristic of our age – the rapidity of innovation, adoption and change is unprecedented. It is without a doubt changing our society, our expectations of work, service provision and each other.

Technology is absolutely a force for good, creating access to information, horizon expanding opportunities and the chance to engage with people we wouldn't otherwise know. The future is, and will remain digital.

And so, we have to get better at managing the risks and harms that the misuse of technology imposes on some people – particularly on our children and young people. And by 'we', we primarily mean companies that profit from the internet, plus parents, teachers, policymakers and civil society. It is not acceptable that children are bullied, exploited, or harmed in anyway through the use of technology - and as technology becomes more meshed into our lives, our diligence in reducing risks and mitigating harms must intensify.

Internet Matters, an industry coalition, was founded with the expectation that our organisations have a responsibility to help keep children safe online. We all recognise that companies have a responsibility to uphold online safety and our collective judgement was that the best way to exercise that responsibility was to create an independent organisation solely focused on this goal. Moreover, it provides a framework for us to work collaboratively around a unifying message to have maximum impact.

Internet Matters continues to prove us right. From their impressive reach, to the measurable impact they are making on parents, this has been another great year for Internet Matters – and we are proud of their achievements.

Yet there remains so much more to do. As the advances in technology march on, the need for an evidence led, reasoned approach will only intensify as society adjusts to this new environment. We could reach a wider audience and have an even greater impact with more support, so we remain committed to both encouraging industry to join our coalition, and ensuring we connect parents, carers and professionals with the very best advice, help and support that they tell us they need.

The CEO Board of Internet Matters



"The internet is an extraordinary force for good but it was not designed with children in mind. By bringing together industry and providing expert advice to parents, Internet Matters is making an important contribution to giving children the resilience, information and power they need to make informed choices in this rapidly growing digital world."

Anne Longfield, OBE Children's Commissioner for England





It can be hard to keep up with advice on how to keep our children safe given the relentless pace of development of digital technologies. We're excited about our continued partnership with Internet Matters as we continue to see a real benefit in providing a one-stop shop where parents feel confident in getting simple, effective and practical advice – allowing them to take simple steps that make a real difference.

Marc Allera

Chief Executive Officer



Sky is committed to helping our customers stay safe online. Education is a key part of that and we are proud to work with Internet Matters to ensure parents have the best advice and resources possible to enable their children to safely enjoy the positive benefits of technology. This work complements the legislative proposals we have called on Government to take to ensure we are all best protected from online harms.

Stephen van Rooyen

Chief Executive Officer UK & Ireland

TalkTalk

As a founding member of Internet Matters, we are incredibly proud of what we've all achieved so far. Families need consistent and clear advice when it comes to protecting children online, and as we face ever-evolving technological changes, it's crucial that we all stay one step ahead. Industry collaboration is key for reaching parents at scale and we therefore look forward to welcoming more businesses into the coalition to drive this critical work forward.

Tristia Harrison

Chief Executive Officer



Internet Matters provides parents and carers with comprehensive advice they can trust on a range of online issues. This important initiative is all the more powerful because of the collaborative approach taken by its members. Virgin Media is proud to be a founder member of Internet Matters and would encourage all our industry partners to join us to help deliver simple and effective advice to parents on child online safety.

Tom Mockridge

Chief Executive Officer



Google believes deeply in technology's ability to unlock creativity, and we work hard to ensure that parents and children have the tools and knowledge they need to make smart and responsible choices online. We recognise our responsibility to helping families enjoy technology smartly and safely and are proud to be part of the Internet Matters coalition.

Eileen Mannion

Vice President of Marketing



The BBC is committed to supporting and guiding children in their online experiences and we recognise the vital role that conversations between children and their parents plays in this area. Internet Matters is an important service in helping parents get better equipped to support their children. Complementing our own work, they are an important resource that is making a tangible difference.

Alice Webb

Director, BBC Children's and North







£10m cash investment



9 full time members of staff



Multi-million support



Two events for wider stakeholder

"Online safety for children was a significant issue when Internet Matters was created, and in just four years the scale of the challenge and the range of issues we educate parents on continues to grow."

Carolyn Bunting CEO Internet Matters



Never has Internet Matters been more relevant or more needed. With so many challenging issues there remains much to do. Internet Matters is unique for three reasons:

- We are absolutely and resolutely focussed on keeping children safe online. We listen to thousands of families every year and give them the resources, the tools and the language they need to engage with their children - whatever their age, whatever their issue
- We are the outcome of deliberate and proactive industry collaboration, where huge brands have put their collective resources behind a combined and consistent message to parents across the assets of some of the largest tech and communications companies in the UK
- We actively support the work of the wider sector by acting as a portal; connecting parents in crisis to expert help from specialist organisations

Throughout this report I hope you'll see these three things - the consistent focus on safety, the insights from families and the significance of industry collaboration weave through our work. None of this would be possible without the active support of our industry partners.

We have a fantastic opportunity to educate and equip parents to be active participants in their children's online world. This requires a consistent message, backed up by evidence, which signposts parents to a single destination. I believe Internet Matters, with government, industry and sector support will continue to make a material difference to families across the UK.

Our vision and strategy remains:

Empower all UK parents and carers to help their children benefit from digital technology smartly and safely.



Product

Bring together the best advice & support tools for parents in one place



Channels

Engage through the most effective channels at key moments



Insight

Be the trusted voice for parents



Partnership

Through partnership maximise reach & impact

Listening and responding to parents' needs

The work of Internet Matters is underpinned by an ongoing programme of research with parents and families across the UK. Through qualitative and quantitative methods we identify parents' attitudes, concerns and needs about their children's online safety and this output is critical in defining our propositions.

Digital resilience

In the same way as parents teach children to ride a bike by taking them through different stages, so with the internet we need to teach how to handle different situations online through active conversations. To help parents support their children in making smarter choices online as they mature, together with our Ambassador Dr Linda Papadopoulos we created a digital resilience toolkit featuring age-specific advice to help guide parents on what to focus on at key moments of their child's development.

"By building a child's digital resilience, parents will not only help keep their child safe online but essentially empower them to navigate digital issues on their own."

The content has reached over 3 million people demonstrating the demand for resources and content of this type.

Parents' concerns about online safety issues for children



% of parents speaking to children about online safety in the last month



Source: Impact Tracking W4 Aug 2018, Internet Matters



Overall 14% of parents felt the internet had a **negative impact** on their child's emotional wellbeing while 17% felt it had a positive impact

Cybersafe 2016, Internet Matters



Of parents said their child suffered from wellbeing issues as a result of social media

Impact Tracking, W4, 2018, Internet Matters



Of parents are concerned

their children have a lack of interest in other activities compared to going online Cybersafe 2016, Internet Matters

Mental Health

Whilst parents identify a number of areas where the internet has a positive impact, particularly in relation to education, they also tell us they are concerned about the lifestyle pressures created by the perceived requirement on some social media to be physically perfect, and enjoying a lifestyle devoid of dullness. Over 6 in 10 parents tell us they are concerned about the impact of social media on children's mental well-being.

In response, and with expert help, we provide advice for parents on this issue including a list of apps that parents and children could use to encourage wellbeing.

We also offer a comprehensive guide on how to report suicidal intent through social platforms and other organisations to help guide young people on how to take action if a friend was in need.



Gaming

This year, the World Health Organisation (WHO) has for the first time, included "gaming disorder" in its list of mental health conditions. Whilst we recognise that the number of addicts in the WHO definition may be small, time spent gaming is a significant concern for parents.

We partnered with games expert Andy Robertson to provide topical insight on the most popular games children are playing today. From Roblox to Fortnite, we created comprehensive guides on what parents needed to know to make an informed decision on the suitability of the game for their children.



Of parents concerned about contact with strangers while gaming

Source: Impact Tracking W4, 2018, Internet Matters



Average time spent per day gaming by boys



Average time spent per day gaming by girls

Source: Pace of Change, 2016, Internet Matters

Livestreaming and vlogging

There is a lack of understanding amongst parents of what livestreaming and vlogging actually is and how children are using it to broadcast themselves to family and friends. Whilst parents who already vlog and livestream can see the creative benefits it can offer, 86% of parents who do not vlog would be unhappy about their child doing so, rising to 96% for livestreaming.

Older siblings can often be a key factor in introducing children to content creation. Of those parents who are engaged in vlogging and livestreaming, the creativity of content creation, both as a part of childhood in a digital age, and as a life skill, shines through.

However, threaded throughout the report is the reality that most parents are unaware of the potential risks of livestreaming and vlogging, and therefore are unlikely to be equipped to have the necessary conversations with their children which could help them use this technology smartly and safely.

In response we created a comprehensive guide to advise parents on the basics of both live streaming and vlogging and offered practical tips on how to help children do it safely. We were pleased to work in partnership with Huawei to create a new research report - entitled 'All the World's a Stage' which considers these issues in more detail.



Of parents say their children occasionally or regularly broadcast livestream videos



Most popular livestreams are Gaming (39% watch) and Sport (24% watch)

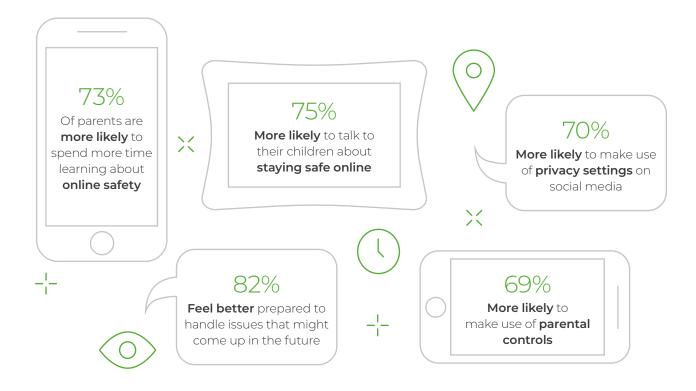


Of all UK parents think parental permissions should be required for children to livestream themselves

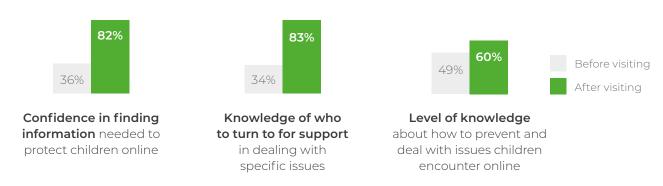
2017/18 A year in review

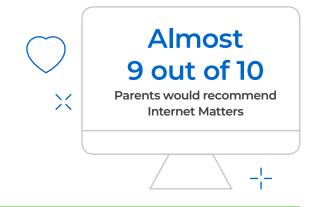
Impact and Action

Understanding the impact that Internet Matters has with families has been a key focus in 2017/18, and we have commissioned an independent third party to establish a measurement framework for the changes in knowledge, confidence and behaviour amongst parents once they had visited the website.



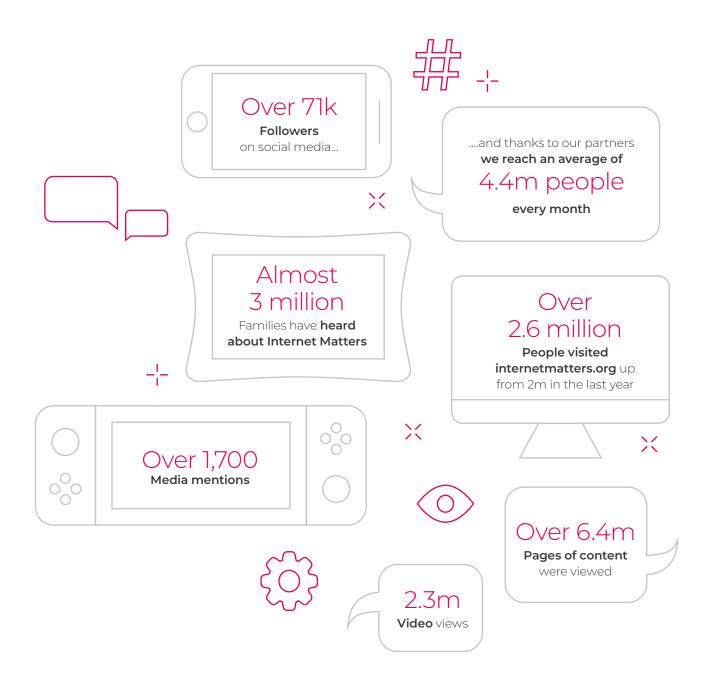
Visiting internetmatters.org has a positive impact on parents confidence and knowledge





Awareness and Usage

This year we saw a record number of visitors to internet matters.org. With the help of our growing number of partners our scale and reach has continued to increase and the diversity of our resources means people are viewing more pages of content than ever before.



September 2017 Campaign:

One Word

One Word sometimes doesn't say it all

HE SAID HE'D DUMP ME UNLESS I SEND HIM MORE NUDES



Dr Linda Papadopoulos Internet Matters Ambassador

"A new school year can be an intense time for children, full of change and full of excitement. This is also a time when they are likely to become more self-aware and focused on how they are perceived by others and more concerned with peer groups as they relate to identity. As such they may feel under increased strain to have a persona online. As the social dynamics of their peer group change, it's important that parents encourage their children to open up about their online activities and find out if their children are anxious about anything, as well as learning about some of the issues they might be facing, including cyberbullying, sexting or seeing inappropriate content."

The campaign bought to life the challenges parents may face in getting children to open up about their online experiences. Called 'One Word' it demonstrated there may be hidden meanings behind children's often monosyllabic answers to how they are feeling. These results clearly demonstrate that there is increasing anxiety around the online world for children and therefore, reaching out to parents in the back to school period was crucial.

Insight



Of children would not speak to their parents if they had been upset by something online



9 out of 10

Children said they would turn to their teacher if they had been upset face to face



33%

Only a third would turn to their teacher if they had been upset by something online

Impact

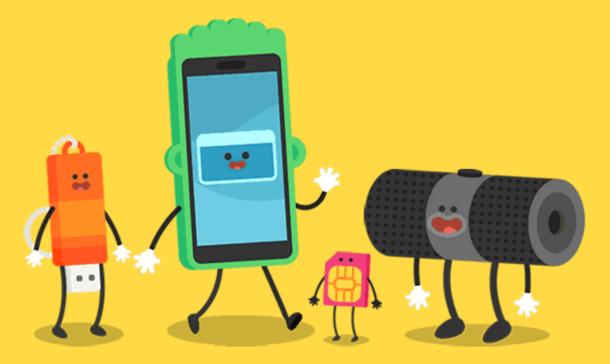
- Over 330,000 people visited the campaign page to get more advice
- Over 1.2million people watched one of the four videos that addressed cyberbullying, sexting, peer pressure and inappropriate content
- Over 12.5k people downloaded the back to school online safety guide
- 6k people watched our smartphone health check video giving advice on how to set up a smartphone safely

The Royal Foundation Taskforce on the Prevention of Cyberbullying Campaign, November 2017:

Stop Speak Support

Helping children learn how to respond to online bullying

STOP SPEAK SUPPORT



...when you see online bullying



Martha Evans Director, Anti-Bullying Alliance

"Research shows that while children don't necessarily want their parents hanging over their shoulder whenever they are online, they do want their parents to talk to them about their online behaviour and to set appropriate boundaries. In 2016, HRH The Duke of Cambridge brought together leading tech companies, NGOs, and independent advisors to create the Royal Foundation Taskforce on the Prevention of Cyberbullying. The taskforce has worked with young people on its campaign, Stop Speak Support to help tackle this growing issue."

Stop Speak Support aims to empower young people to act as 'upstanders' online. It encouraged young people to stop and think about what they've seen, to speak about it and report it to someone they trust, and service providers, and to seek support for the person/s affected.

Amongst the charities and industry partners brought together by the Taskforce, Internet Matters worked to engage parents and provided them with information they needed to understand the new code of conduct and have open conversations with their children.

Insight



3 in 5

Parents are 'concerned' about the risks of cyberbullying



1 in 10

Parents are aware that their child has been involved in a cyberbullying incident



However, 32% of parents said they are yet to talk to their children about it



1 in 5

Teenagers claim to have experienced cyberbullying

Impact

Internet Matters was delighted to work collaboratively with the members of the Taskforce to promote such an important campaign. Using a careful balance of humour and emotion, the campaign targeted bystanders and encouraged them to 'stop, speak, support.' The campaign also resonated well with parents.

- Over 160,000 people visited the Stop Speak Support page on the Internet Matters website to learn more about the campaign
- Over 3.7m people were reached with the campaign across our social media channels

February 2018 Campaign:

Set up Safe

Bringing to the forefront the most up-to-date parental control information





David Miles Policy Director, The British Board of Film Classification (BBFC)

"Whilst we know that active parental intervention is the primary driver in helping children enjoy their connected devices smartly and safely, technical tools provide parents with additional mechanisms to minimise the risks that children may face online, for younger children in particular. Measures such as filters for potentially harmful content and privacy settings on social media help children navigate the online world with more confidence and share content more safely."

As we head toward age-verification for online pornography in the UK becoming a reality, we welcome the support of Internet Matters for this very important new child protection measure. We believe that their work, including championing parents in setting up devices with filters and educating children on the importance of privacy settings, fundamentally supports our goal of helping to make the internet a safer place for children."

Insight



7 out of 10

Teens want parents to set filters to protect them online



39%

Of parents set controls across their broadband or mobile network



45%

Of parents apply privacy settings to their child's social media



1 in 5

Parents admit they don't set parental controls as they're 'too restrictive'

Source: Set Up Safe, Opinium 2018

Impact

The Set up Safe campaign raised awareness amongst parents that these tools exist and that they are one option in the toolkit of mediation strategies. We wanted to highlight that Internet Matters offers a one-stop-shop solution and that setting up parental controls needn't be a daunting task.

- Over 400,000 people responded to our campaign activity and sought help with setting up parental controls
- The parental controls section on internetmatters.org is the **2nd most** popular section on the site
- The most commonly accessed guides are the Set up Safe Checklist, YouTube Restricted Mode, Google SafeSearch and Apple iPhone
- Parents are 71% more likely to make use of privacy settings on social media and
- 69% more likely to make use of parental controls having visited our website

Maximising Reach and Impact

Founding Members:







BT Consumer Group have invested millions to provide parental controls and education to help children use the internet safely. We promote a large variety of free parental controls for home and mobile, public wi-fi, and on demand TV content. BT Parental Controls and Plusnet SafeGuard allow parents to block numerous categories of online content such as pornography, gambling and hate sites. EE Content Lock helps to keep children safe online by blocking 18-rated content. Content Lock has three settings - Strict, Moderate and Off so you can choose exactly what level of security you'd like.

However, technology alone cannot ensure the protection of children online. So we worked with others to set up Internet Matters to provide education and advice to parents to help children build their online resilience and make the right decisions when online. Working with Internet Matters, EE is training thousands of employees across over 600 retail outlets, preparing them to offer the best support on safety options and parental controls as well as directing them to resources to help deal with difficult subjects like cyberbullying.



Sky is committed to keeping our customers safe online through education, parental controls and safe product design, and progressive policy development.

Sky continues to invest in its award-winning safety products. Sky Broadband Shield is offered free to all of our customers and is applied by default meaning the greatest possible number of customers are protected. We have continued to invest in our Sky Kids app, which offers family friendly viewing in a safe environment. By applying safety by design principles, the app's features include individual user profiles and a bedtime setting.

Through education and responsible products, Sky plays its part in offering our customers a safe online experience. But we are aware that whilst the internet offers great opportunities, risk of online harm will always be present. That's why we commissioned a report "Keeping Consumers Safe Online" that set out how the Government could create an accountability framework to ensure proper oversight. The Government has set out how it will release a White Paper detailing proposals for online safety legislation. This is a great opportunity to help ensure the UK is the safest place for children to be online.

Internet Matters is above all a partnership between the Member companies, our Partners and Supporters. And, like all partnerships we achieve far more together than we could separately.

It is the partners' consumer reach combined with our expertise that sets us apart from other organisations. Together, we have reached millions of parents with a critical online safety message.

TalkTalk

TalkTalk recognise the importance of creating products to help families feel confident online. In 2013 TalkTalk became the first ISP to introduce free parental filters to our customers. Today, around 36% of new customers apply our filtering service HomeSafe at the point of sale, which is broadly proportionate to the number of UK households with children. In 2017, we launched our Kid's Remote which allows children to navigate our TV services within a walled garden of parentselected content.

TalkTalk is proud to work collaboratively with others to make the online world safer. We are a Member of the UK Council for Child Internet Safety (UKCCIS) and sits on the Funding Council of the Internet Watch Foundation (IWF). We are a member of the Royal Foundation's Taskforce on the Prevention of Cyberbullying and seconded a TalkTalk staff member to the Taskforce to support its work. In addition, along with other ISPs and mobile operators, we are currently working with the Department for Digital, Culture, Media and Sport and the British Board of Film Classification (BBFC) to implement the Digital Economy Act 2017's ageverification processes for online pornography.



At Virgin Media we put child online safety front and centre of everything we do. We both empower our customers to make decisions that are right for their household through technical tools, and – by working with our industry partners - we help equip parents and carers with advice and support. We believe that building resilient children, who can navigate the world in front of them, is vital.

Our parental controls are available to our Virgin Media and Virgin Mobile customers. We have two products: WebSafe and F-Secure SAFE. Websafe provides antivirus protection and parental controls, which mean certain websites cannot be accessed on your home Internet, no matter which device is trying to access them. For enhanced internet security, we also offer our customers F-Secure SAFE too, which can be installed on your mobile, tablet or desktop. F-Secure SAFE helps to keep our customer safe online when on 4G or out of the home. There are also advanced parental controls where access to websites can be filtered based on age category and you can also set limits on your kids' screen time wherever they are.

Virgin Media is a Member of the UK Council for Child Internet Safety (UKCCIS), a Member of the Royal Foundation's Taskforce on the Prevention of Cyberbullying, and sits on the Funding Council of the Internet Watch Foundation (IWF).

Maximising Reach and Impact

Members of the Board:



In December 2017 the BBC launched Own It. a new website full of fun and empowering tips, insight, stories and advice to help 9-12 year olds get the most out of their time online.

Own It brings a child's perspective to online life and the issues it throws up. It covers everything from online privacy and avoiding malware, through to dealing with the everyday dilemmas children face online, at the same time as having fun. Quick links to charities and organisations like Childline, whose phone lines and online chat can provide urgent support should children need it, will also be available.

Part of a multi-million pound investment in children's services by the BBC, Own It aims to help children develop the confidence and resilience to tackle the everyday challenges they face online. Own It will be joined by other longer term projects over the coming years, including new apps, games and personal and participatory experiences for children of all ages designed to help children get the very most out of their online experiences and grow into well-informed, responsible and enfranchised digital citizens.

Google

Google recognises keeping the web safe for everyone is a shared responsibility and from a family perspective they focus on helping them build good online safety habits with tools from Google and advice from family safety partners, including Internet Matters.

In February Google launched Family Link, a new product designed to help families set digital ground rules, and in partnership with Internet Matters launched a co-branded advertising campaign raising awareness amongst families of the product. Other safety products include Google Safe Search and YouTube Restricted Mode which filter out mature content that families may prefer to avoid. Google and Internet Matters are also collaborating to bring online safety training to parents with children at primary school through a series of Digital Garage workshops, launching later this year.

This builds on two existing successful Google programmes. Be Internet Legends, an approved school resource to support the requirements of the online safety aspects of the Key Stage 2 curriculum and Be Internet Citizens, teaching 13-15 year olds about media literacy, critical thinking and digital citizenship. In total through online and offline activity Google aim to reach one million young people through these programmes this year.



Of parents more likely to use a company which supports Internet Matters



Of parents believe a company which supports Internet Matters can be trusted by families



Of parents say a company that supports Internet Matters must want to keep children safe online

Source: Impact Tracking W3, 2018, Internet Matters



Corporate Partners & Supporters

We are supported by some of the biggest names in UK industry and together they help us maximise our reach and impact. This unique organisational structure allows us to reach almost every family in the UK.



In 2017 Huawei joined us as a Corporate Partner. Huawei has a broad digital offering, from consumer devices to network infrastructure.

We have been particularly pleased to help them deliver a range of internal communications to engage their staff and subsequently the marketing activity has grown across corporate and consumer sides of their organisation.

Additionally, Huawei have sponsored our report into vlogging and livestreaming, which is a natural association as they help partners deliver these services through their extensive network infrastructure capability.



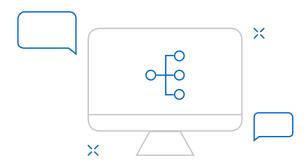
Twitter have been a supporter of Internet Matters for several years and they continue to help us use their platform to increase our reach and impact through in-kind and financial contribution.



Facebook is our primary media platform to engage with parents. We work closely in partnership with them to deliver tailor made and optimised advertising across their platform to target parents on online safety and drive quality traffic to internetmatters.org



We have been working with Currys PCWorld on association with their "my first laptop" summer campaign. As a Supporter, they have been exploring various ways of extending their association.



This year we are pleased to welcome new supporters, who have helped raised awareness of Internet Matters through a range of marketing activations:



KCOM is a responsible broadband provider, dedicated to working with the local community to help them get the best out of the Internet.

As part of its commitment to online safety, KCOM support the work of Internet Matters, as a highly visible destination for advice for parents to help them keep their children safe online.



KD Group are committed to delivering the most fun and safe products for children and family, including Kurio Tablets and wearables, Animated TV Series, Apps, Learning Toys, Games and Lighting Products for children. They see this association helping grow customer credibility and trust with their own brand.



Nokia are dedicated to device security and the relationship with child online safety in the connected home and this association provides a great platform for them to have a meaningful conversation with their customers. We have worked with Nokia on a political roundtable on online safety.

smoothwall

Smoothwall focus on providing and developing solutions to help keep children safe online. They're working on a range of activations that include expert insight contribution on subjects such as Digital Piracy for our publications, and external event support.

Working with Others

Precisely because Internet Matters was founded through collaboration, we are always keen to work with other organisations that share our vision and can help us enhance our thinking and achieve reach and scale.

This year has been no exception as we have sought out opportunities to learn from and share our expertise with other organisations.



UKCCIS

We are on the Executive Board of UKCCIS and additionally are active members of the Technical and Digital Resilience working groups. We look forward to working with colleagues from across the charitable sector and with commercial partners as the shape and function of the new UKCCIS evolves as part of the Internet Safety Strategy.



Department for Education

We were delighted to receive a second year's funding for our online reporting platform for bullying in schools, from the Department for Education. In partnership with Tootoot, the Make a Noise programme has been deployed in over 180 schools across the country, providing pupils with an anonymous reporting platform combined with a resource centre for pupils, parents and staff.



Promoting Safer Internet Day

The UK Safer Internet Centre's, Safer Internet Day is a focal point that we actively support each year. Working with our partners we coordinate activity to drive the maximum reach and exposure we can for the day, and this year we were delighted to launch new insights into the use of parental controls, supported by our expanded parental controls resources.



Supporting Anti-Bullying Week

We are delighted to be members of the Anti-Bullying Alliance and work together on a number of programmes, including Anti-bullying week, the Royal Foundation Taskforce on the Prevention of Cyberbullying and Make a Noise.

In support of Anti-Bullying Week, we created a dedicated parent advice page on our site, promoted across all our social channels. It reached over 2 million people over the course of the week and a further 6 million over the campaign.



Working with our **Expert Advisory Panel**

The Expert Advisory Panel provides us with insight, alerts us to issues and provides a friendly critique of our work. We are indebted to them for their commitment and expertise. As we move the organisation into a more established phase, we look forward to making more strategic use of their expertise. We are delighted that Barnardo's have joined the panel this year. The panel comprises:



Martha Evans Director, Anti-Bullying Alliance



Emily Cherry Assistant Director, Policy & Public Affairs, Barnardo's



David Miles Policy Director, **BBFC**



Marie Smith Head of Education, CEOP



Will Gardner CEO, Childnet International



John Carr Chair, Coalition of Children's Charities



Pamela Park Deputy Chief Executive, Family Lives



Lauren Seager-Smith CEO, Kidscape



Tony Stower Head of Child Online Safety, **NSPCC**



Jonathan Baggaley CEO. PSHE Association



Prof Emma Bond Director of Research, University of Suffolk



