

PLAYREPORT

International Summary of Research Results

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Prepared by



Family Kids and Youth

P.O. Box 25, 122 Watling Street
 Radlett, Herts, WD7 8QR
 Tel: +44 (0)1923 858438
www.kidsandyouth.com

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BACKGROUND AND TECHNICAL NOTES

- IKEA has undertaken a major research-driven project to investigate the subjects of children's development and play.
- Survey fieldwork was carried out online in 25 countries by Research Now, London. Family Kids and Youth partnered with IKEA to design the questionnaire, analyse the results and provide an overview of child development and background to the importance of play. The countries surveyed were:



- 7,933 Internet-based interviews were conducted with parents (10 minutes' duration) and 3,116 interviews with children (4 to 5 mins) during October and November 2009. In each country:
 - at least 300 parents of 0-12 year olds were interviewed (50% mothers, 50% fathers)
 - at least 100 children aged 7-12 were interviewed
- As all interviews were conducted via the Internet, these survey and report findings only represent the views of parents and children with Internet access (usually at home), sometimes referred to in this report as 'online parents/children'. In surveyed countries (e.g. China, Russia) where Internet access incidence is relatively low, the views of lower income, rural, less technically literate and other parents may be underrepresented.
- Because of sampling confidence intervals, caution should be exercised when findings are used. Generally, parent data differences between countries should equal or exceed 10 % points to be statistically significant and differences between parent data for one country and the all-country Index average (a straight, weighted average of all 25 country datasets) should equal or exceed 7 % points. Corresponding required differences for the children's survey data are approximately 15 and 10 % points. Family Kids and Youth and Research Now are happy to advise further on data confidence issues.

THE STATE OF PARENTHOOD

1.1 ASPIRATIONS FOR CHILDREN (AQ2a-c)

BACKGROUND

Parents, naturally, want the best for their child, and playing with their child can be great fun for adults

This does not have to be prescriptive, children naturally play

Parent-child play is a characteristic of developed Western societies, and is especially more likely to be found in more educated and / or higher SES groups

Play transmits cultural values from one generation to the next, and this can be an important function of adult-child play

Play can be fun for adults, but it can also be a means of distracting children, in order to keep them occupied

- Happiness is almost universally parents' main wish for their children:**

Almost all online parents (All-country Index 87%) select 'to be happy' as one of their three most important wishes for their children in future – with three quarters (Index 72%) also selecting this as their single most important aspiration.

- Happiness of children appears to be particularly important to parents in**

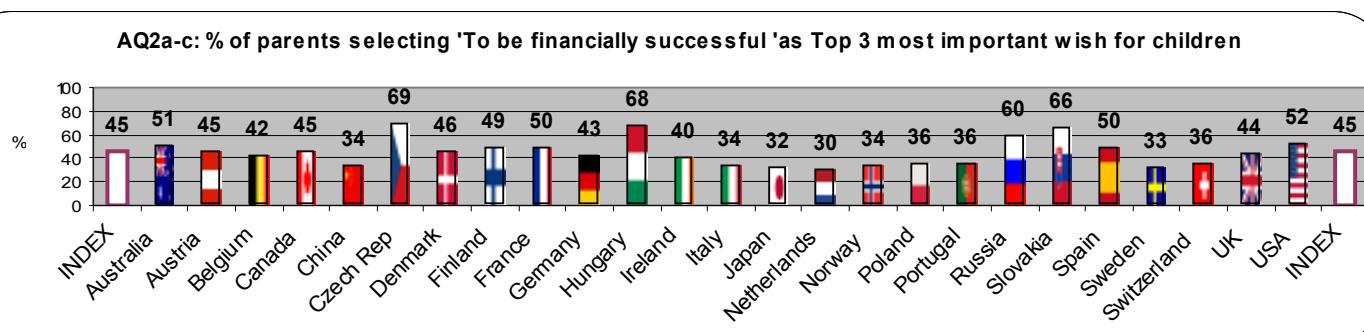
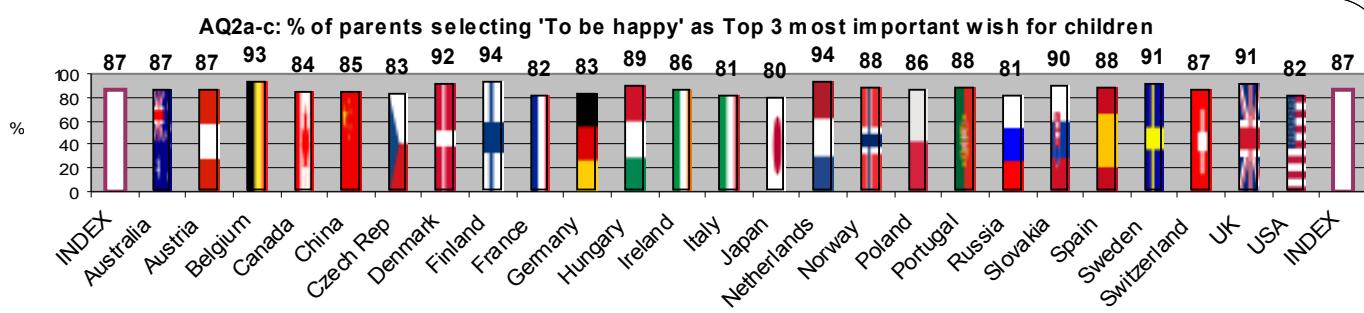
Scandinavia and Benelux: Online parents in (in order of strength of agreement) Finland, Netherlands, Belgium, Denmark, Sweden and the UK are most likely of all to select happiness as one of their three top aspirations for their children. Parents in (in order of weakness of agreement) Japan, Italy, Russia, France and USA are meanwhile least likely to do so.

- Growing up to be thoughtful of others (Index 46%, top 3), financial success (Index 45%) and having a family of their own (Index 34%)** are also relatively important parental aspirations.

- Thoughtfulness is particularly valued in Italy, Japan, Netherlands and, to a lesser degree, in Australia, Denmark, Sweden and Norway. It is least aspired to in Hungary, Slovakia, Spain and Czech Republic.**

- Financial success is most strongly aspired to by parents in Czech Republic, Hungary, Slovakia and Russia** and least so in Netherlands, Japan, Sweden, China, Italy and Norway.

- Parents in Czech Republic, Hungary, Sweden, Slovakia and Russia are most likely to wish for their children to have a family of their own,** while those in Netherlands, Denmark, Japan, China and USA are least so.



1.2 PARENTAL INFORMATION - SOURCES AND TRUST (AQ1a, b)

BACKGROUND

Parents are often hungry for information, but they will only trust that which is not patronising, nor prescriptive

Finding time to play with children when parents are busy and preoccupied with concerns such as family finances, job stability, and ensuring that their children are healthy, can be difficult

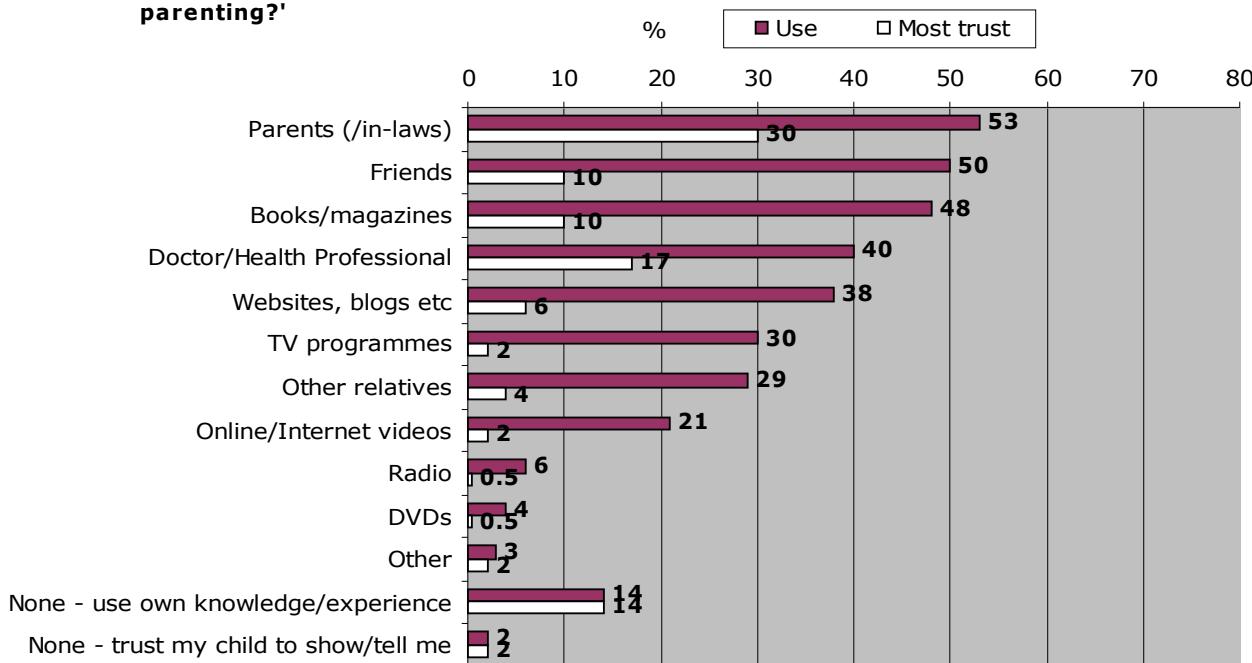
Understanding that play is as important to children as having the right diet and taking enough exercise can help parents to put more emphasis on play

Play is generally encouraged by 'experts' and books and media that look at child development

It is often a feature of parenting courses, and is encouraged amongst lower SES families who are perceived to be in need of such advice

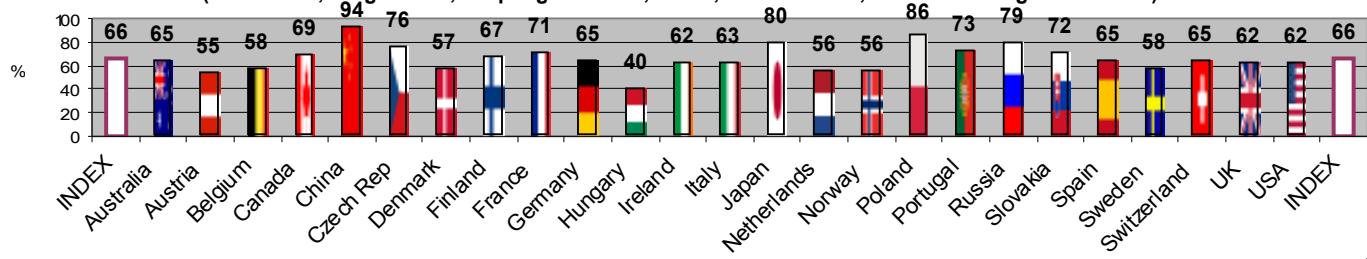
- Both our international survey and our preliminary discussions with parents around the world point to a strong demand for trustworthy information sources about parenthood. Our discussions, in particular, pointed to a strong desire – often unfulfilled – among parents everywhere to find reliable and authoritative 'norms' of parenthood and information that would help them comply with these norms. Social or peer acceptability appears to be an underlying driver here. Our international survey analysis meanwhile throws more light on the differences in current use and trust of information sources across the globe.
- Our All-country Index of international survey results demonstrates the wide range of different information sources about parenting that are used around the world – and shows which are trusted most by online parents:

ALL-COUNTRY INDEX AVERAGES - AQ1a 'Where do you go for information and advice on parenting?' & AQ1b: 'And which do you most trust for information and advice on parenting?'



- Parents online around the world most commonly seek advice from their own parents/parents in-law, friends, doctors and a wide range of different media (most commonly books & magazines, websites & blogs and TV programmes). Use of any media (books, magazines, TV programmes, DVDs, online video, websites/blogs and radio) is particularly low in Hungary and is below average in Austria, Belgium, Denmark, Netherlands, Norway and Sweden.**

**AQ1a: (parents) 'Where do you go for information and advice on parenting?' % selecting 'Any Media'
(i.e. books, magazines, TV programmes, DVDs, online video, websites/blogs and radio)**



- However, the sources parents most trust are far less diverse:** their own parents (/in-laws) and doctor or health professional are most often their most trusted sources of information. Some interesting local variations present themselves though;
 - levels of trust in doctors as a source of parental information are below the Index average in Austria, Denmark, Hungary, Japan, Norway and Sweden
 - levels of trust in friends exceed the Index average in Denmark, Germany, Japan, Norway and Sweden
 - trust in books & magazines, TV programmes, DVDs and online video is particularly high in China, replacing trust in parents/in-laws for many
 - parents in Hungary, Netherlands, Norway are more likely than average to prefer to trust their own knowledge and experience

- **At international Index average level, parents of younger children (0-6 years) are more likely than parents of children aged 6 or older to consult all available sources** of information (people or media-based) and less likely to rely on their own knowledge and experience.

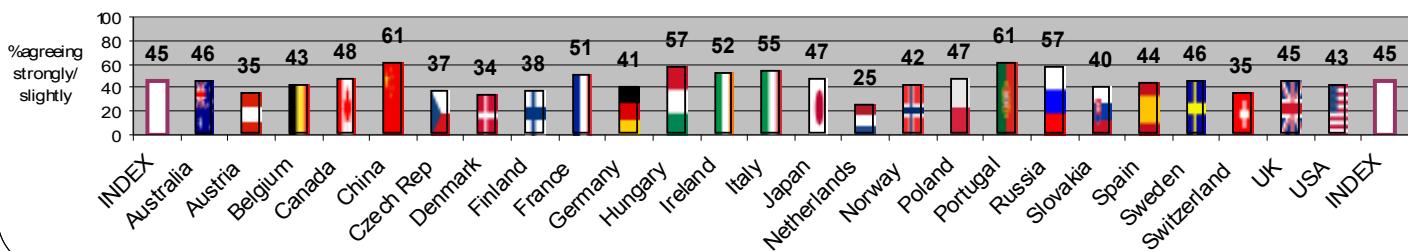
1.3 TIME PRESSURES AND ORGANISATION (AQ5.7, AQ5.2, CAQ5, CBQ10.7, AQ5.5, AQ6.2, AQ5.6)

BACKGROUND

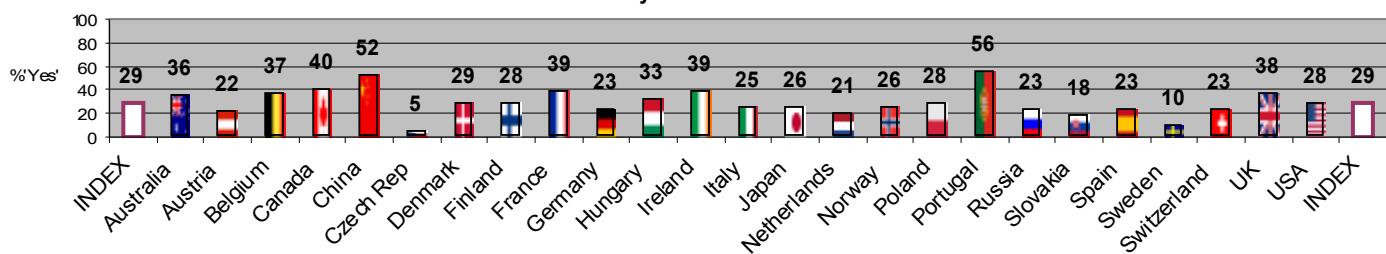
Parents in developed countries are frequently cash rich and time poor
Many parents feel guilty that they do not spend enough time with their children
In industrial societies, adults invest more time in children's play, and generally aim to help their child's educational ability
They are likely to encourage certain kinds of play, including pretend play
There may be some encouragement to do this by commercial interests such as toy manufacturers, as well as a prevalent play ethos that argues that play is good for a child's healthy development and well-being
A report from the Future Foundation (2006) showed that parents spend quadruple the amount of time looking after their children (an average of 99 minutes per day in 2000) than they did 25 years ago (an average of 25 minutes per day in 1975)
Much of this is because of parents' fear of allowing their child to play unsupervised

- **Many parents feel that they struggle to find time to play with their children:** Index all-country averages show that almost half (45%) of online parents surveyed agree that 'I feel that I don't have enough time to play with my children' (13% strongly agreeing, 33% slightly), while the same proportion agree that 'I often feel guilty that I'm not spending enough time with my children' (15% strongly, 31% slightly).
- **Particularly 'time-poor' countries, where significantly higher than average proportions of parents agree that they don't have enough time to play with their children** are (in order of strength of agreement) China, Portugal, Hungary, Russia, Italy, Ireland and France. Significantly 'time-richer' countries meanwhile include Netherlands, Denmark, Austria, Switzerland, Czech Republic and Finland.
- **In these 'time-poor' nations, proportions of children online who feel they would like their mum and dad to organise more things for them outside school are often significantly above average.** This is the case in China, Portugal, Ireland and France, while children's attitudes are closer to average in Hungary, Russia and Italy. But in almost all countries surveyed, there are high levels of correlation between parents' 'time poverty' or 'richness' and proportions of their children wishing to have more organised for them outside school (compare graphics AQ5.7 and CAQ5 below).
- **Similarly, in almost all countries surveyed, children whose parents feel they do not have enough time to play are significantly more likely** than others to agree that 'I would like my mum and dad to spend more time playing with me'. China and Japan present exceptions to this rule.
- **However, there is far less correlation** between time poverty in particular countries and proportions of children agreeing that 'I do not play enough with my family'. Semantic issues ('family' also includes siblings and other relatives) are likely to account for this though.

AQ5.7: % of parents agreeing 'I feel that I don't have enough time to play with my children.'

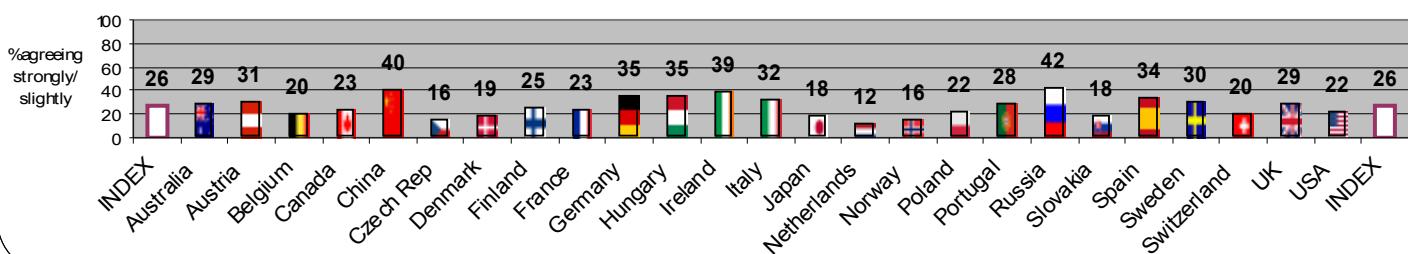


CAQ5: % of children saying 'Yes' to 'Would you like your mum and dad to organise more things for you to do when you are not at school?'



- **Strikingly, almost three quarters of online parents in our countries agree that 'I would like to have more time to just chill out with my children', with fully one third agreeing strongly (36% strongly, 35% slightly).**
- **Even when parents do find the time to play, a significant minority feel too distracted by other concerns to enjoy it:** one quarter (26%, 5% strongly) agree that 'When I play with my children I am often too stressed to enjoy it'. Levels of agreement here are significantly above average in Russia, China, Ireland, Germany, Hungary, Spain and Italy.

AQ6.2: % of parents agreeing 'When I play with my children I am often too stressed to enjoy it.'



- **More than half of parents surveyed (55%, 17% strongly) agree that 'I believe that I do spend enough quality time with my children.'**

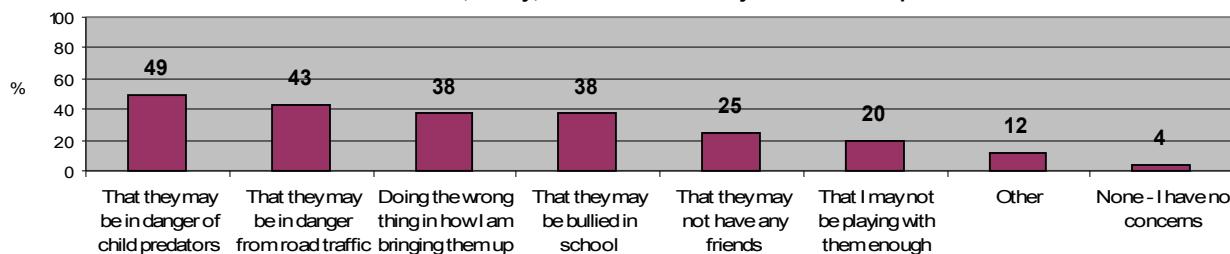
1.4 SAFETY, CONCERN AND RISK AVERSION (AQ4, EQ2.1, EQ2.2, EQ2.6, CEQ3.1)

BACKGROUND

It is argued that we live in a risk averse society, and that children's freedom is being curtailed by an over protective and anxious view of children's safety. Social commentators have pointed out that children today have far less freedom than previous generations, with fewer children being allowed to play out alone, or even walk to school. Media coverage may create fear and anxiety amongst parents, although in reality children are no more likely to be harmed by strangers now than they were 20 or 30 years ago. While there is understandable concern about risks for children, it is likely that children who are most at risk are those who are generally vulnerable, and may not have responsible adults around for them who are looking after their needs.

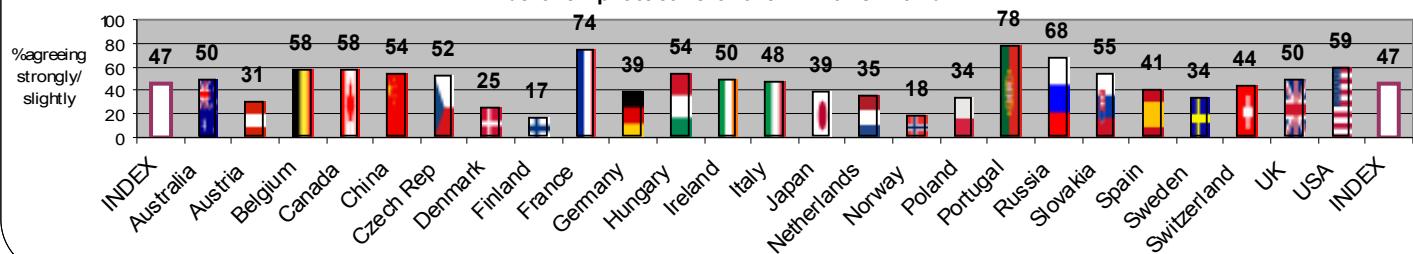
- In addition to the pressures of time and the difficulties of finding trustworthy sources of guidance, today's parents are also increasingly concerned about protecting their children from unwelcome external factors.** All-country Index data show that, on average across all countries surveyed, 'stranger danger', danger from road traffic, lack of confidence in their own parenting skills and bullying at school all worry more than a third of online parents.

ALL-COUNTRY INDEX AVERAGES - AQ4: 'Parents have told us about some of their concerns for their children. Which, if any, of these concern you most as a parent?'



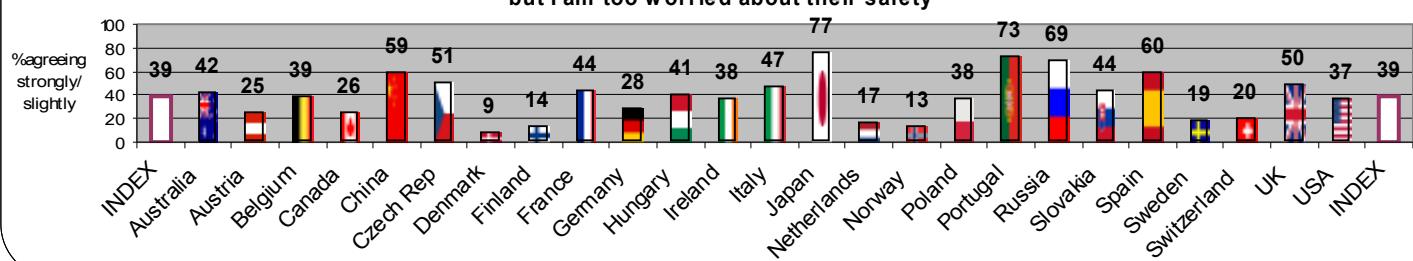
- These concerns, in turn, give rise to worries about over-protection of children and the effect of such over-protectiveness on children's development, education and, of course, opportunities to play.** Almost half (46%) of parents interviewed agree that 'I think as a society we have now become too over-protective to our children', while more directly, a similar proportion (47%) agree that 'I am very concerned about keeping my children safe and feel I have to be over-protective of them in this world'.
- Levels of concern (as shown by this latter measure) are particularly high in Portugal, France and Russia** and are significantly above average in Belgium, Canada, China, Hungary, Slovakia and USA – whilst parents in Austria, Denmark, Finland, Germany, Japan, Netherlands, Norway, Poland and Sweden are relatively less so.

EQ2.2: % of parents agreeing 'I am very concerned about keeping my children safe and feel I have to be over-protective of them in this world'

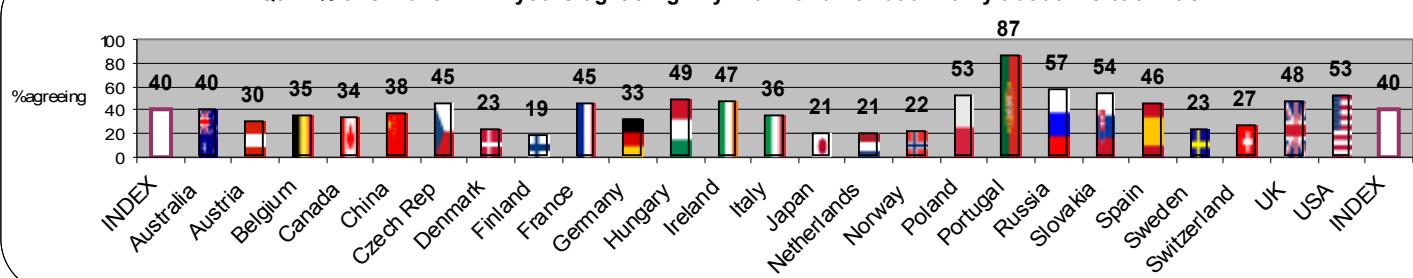


- The direct effects of these safety concerns on children's play can also be seen: two in five parents (39%) interviewed in our countries agree that 'I would like my children to be able to play out but I am too worried about their safety':** levels of agreement here are particularly high in Japan, Portugal and Russia and are also significantly above average in China, Czech Republic, Italy, Spain and UK. Again though, levels are below average in all Scandinavian countries and in Austria, Netherlands and Switzerland.
- Nor do the effects of over-protectiveness stop there: two in five children (40%) interviewed around the world agree that 'My mum and/or dad worry about me too much':** however, as might be expected given the findings above, children in Scandinavia, Netherlands and Switzerland are less likely than others feel this – as, more unusually (perhaps for cultural reasons), are children in Japan.

EQ2.6: % of parents agreeing 'I would like my children to be able to play out but I am too worried about their safety'



CEQ3.1: % of children 7-12 years agreeing 'My mum and / or dad worry about me too much'



1.5 FAMILY TIME AND MEALS (DQ1.1, DQ1.3, DQ1.6, CDQ2, DQ2, CDQ1, BQ3.1/.2, CDQ3.1)

BACKGROUND

Eating a meal together as a family is viewed as valuable quality time, and concern has been expressed about children eating separately from their parents

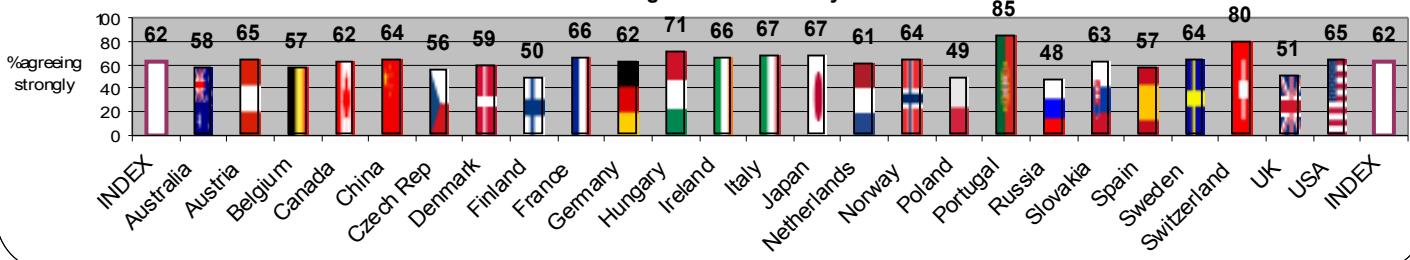
A report by Oxford University (2009) found that more families are eating together at home in the UK as a result of the recession

A quarter of parents questioned said that to keep cost down, they are trying hard to ensure that everyone in the household eats the same meal

Nearly half (48%) of parents said they are eating out less frequently, and 1 in 6 parents claimed they were spending more time with their family as a result of the downturn

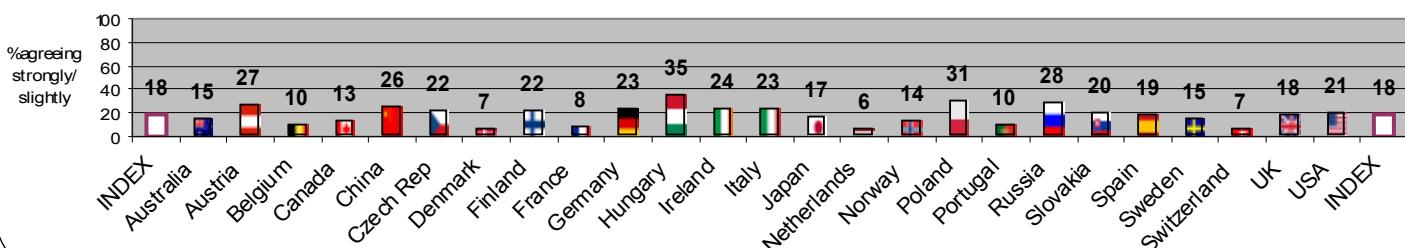
- Given the often significant time pressures acknowledged by many parents, it is understandable that most see mealtimes as a key opportunity to spend time with their children: almost all online parents (88%) agree either strongly (62%) or slightly (26%) that 'It is important that I/we and our child(ren) eat together as a family'. Analysis of those agreeing strongly (only) meanwhile shows that parents in (in order of strength of agreement) Portugal, Switzerland, Hungary, Italy and Japan are particularly keen on this form of family time, whilst parents in Russia, Poland, Finland, UK and Czech Republic are least so. Mothers are also generally slightly keener than fathers on eating together.

DQ1.1: % of parents strongly agreeing 'It is important that I/we and our child(ren) eat together as a family'



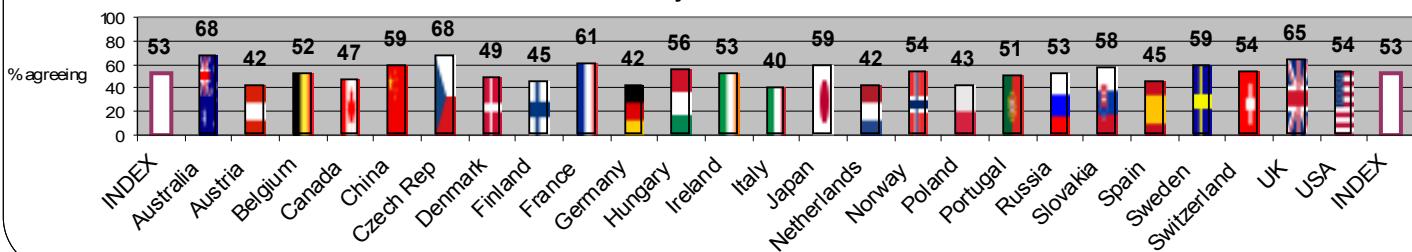
- It follows then that relatively very few (18%) parents agree at all that 'We rarely have time sit down together and eat as a family', although levels of endorsement are relatively high in Hungary, Poland, Russia, Austria and China. Not surprisingly, parents in three of these five nations (Hungary, Russia and China) also feature in our list of seven most 'time poor' countries.

DQ1.3: % of parents agreeing 'We rarely have time sit down together and eat as a family'



- **However, preferred location of mealtimes appears to generate some tension between parents and their children!** While only a quarter of parents (26%) in the All-country Index average agree that 'My children regularly eat meals sitting in front of the TV' (levels are especially high in Japan (51%) and China (44%), where restricted living spaces particularly in urban environments are likely to be responsible), over half of children interviewed (57%) agree that 'It is more fun to eat your main meal of the day watching TV.'
- **Index average data show that parents estimate on average that they eat their main meal of the day with their children 'most days'** (and more often in Netherlands, Denmark, Canada, Switzerland, USA and Australia) while their children, when asked exactly the same question, are in close agreement.
- **For many parents (Index average 41%), cooking or baking presents an appealing way of promoting their children's creativity at home.** More than half (53%) of children interviewed meanwhile agree that they (would) like to spend time baking in the kitchen with their mum and dad. Children in Australia, Czech Republic, France and UK are particularly keen to do this.

CDQ3.1: % of children agreeing that 'I would like to spend time baking in the kitchen with my mum or dad'



THE STATE OF CHILDHOOD

ATTITUDES TO PLAY (CBQ1a, b, CCQ1, CBQ10.7)

BACKGROUND

Play is good for children

It is the way they work out what is happening in their world, and how they learn to explore and find out about new things

Playing is great fun, and is a place where imagination and creativity can flourish, and emotions and feelings can be acted out

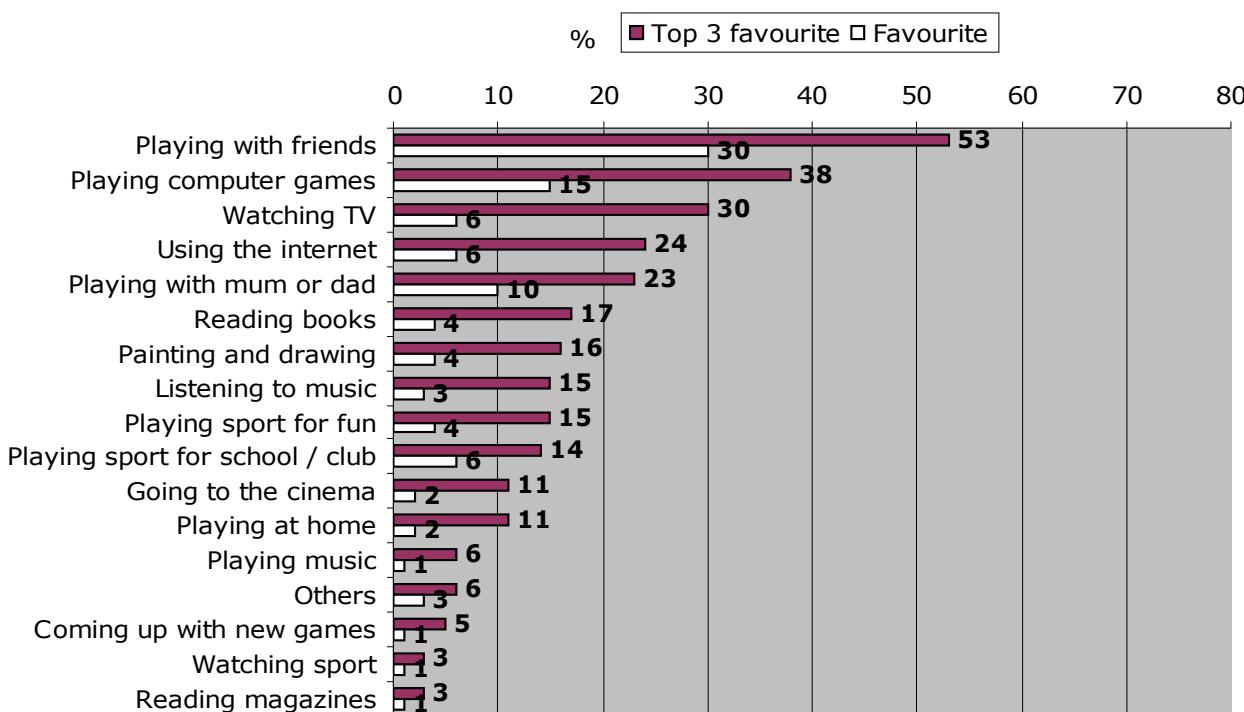
For young children, play is often a means of mastering a new skill, perhaps learning to balance, to walk or run, to open things

Play also given a child a means to work out relationships with peers and with friends

It is argued that children actively seek play opportunities and play partners

- **Playing with friends (30% Index average) is the single favourite pastime of children interviewed around the world, followed – at significantly lower levels – by playing computer games (15%) - and playing with mum and dad (10%)!** Some interesting national variations present themselves; playing with friends is considerably more popular in all Scandinavian countries ($\geq 40\%$) and in Japan (43%). Playing computer games is particularly popular in Eastern Europe (Czech Rep 21%, Poland and Slovakia 23%, Russia 22%), while playing with mum and dad is more popular in Hungary (24%), Austria (19%) and France (17%).

ALL-COUNTRY INDEX AVERAGES - Children: CBQ1a 'Please choose your three favourite things from the list below...' & CBQ1b 'And which one is your favourite?'



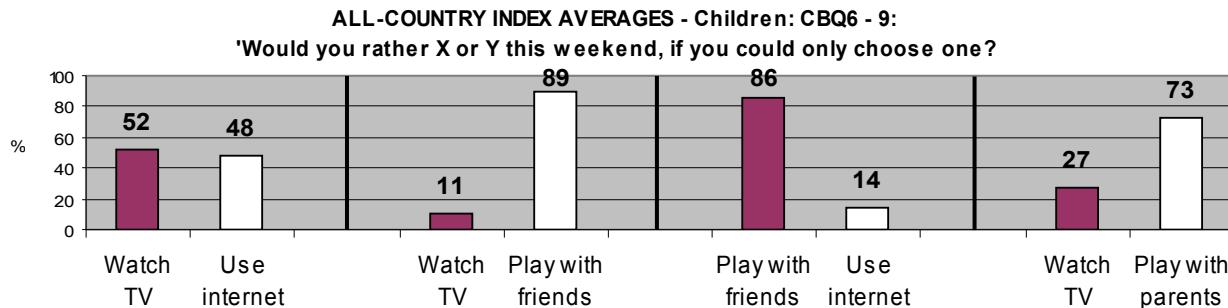
- **As shown in our individual country reports, girls are often more likely than boys to prefer playing with friends**, while boys are often more likely to prefer playing computer games.
- **The time pressures referred to by parents (section 1.3) are likely to at least partly account for the fact that 1 in 5 children (Index average 21%) across all countries surveyed agree that 'I do not play enough with my family'**. Family planning regulations meanwhile may explain the far greater tendency of children in China (41%) to agree with this – but the reason for Polish children's high endorsement here (34%) is less clear.
- **Preferences for location and type of play preferred vary considerably around the world, according to country culture and urban/rural situation**: Therefore large proportions of online children everywhere all agree that 'I prefer to spend time playing outside' (58%, with particularly high levels - ≥69% - in China, Czech Republic, Poland, Slovakia and USA), 'I like playing inside the house' (54%, with ≥64% agreeing in Czech Republic, France, Spain and Switzerland) and 'I like to make up my own activities' (51%, with ≥61% agreeing in Hungary, Slovakia, Sweden and USA).

ATTITUDES TO FRIENDS AND FAMILY (CCQ1.2, CBQ6-9, CAQ4, CBQ10.6)

BACKGROUND

Development psychologists agree that early parental and family relationships have a direct affect on a child's peer relationship. There is evidence that children's social adaptation is highly influenced by friendships. Social competence with peers is related to the children's ability to encode and decode emotional messages, and this is related to children's emotional understanding. Much of this 'encoding' and 'decoding' takes place through play. Peer support groups are being encouraged in schools to alleviate problems such as bullying.

- **Although children clearly prefer playing with friends to playing with their parents (section 2.1), many still share their parents' desire to play more together as a family**: on average, two in five (38%) children in our surveyed countries agree that 'I would like my mum and dad to spend more time playing with me', with this sentiment being particularly strong in China (73%) and Russia (49%). However, in other countries where parents feel especially 'time-poor' (Portugal, Hungary, Italy, Ireland and France – section 1.3) results are mixed, with no further clear differences emerging.
- **A series of paired choices presented to children confirms their strong preferences (section 2.1) for playing with friends and family**: fully 9 in 10 (89%) would prefer to play with friends rather than watch TV, while a similar proportion (86%) would prefer to play with friends rather than use the internet. Three quarters (73%) would meanwhile prefer to play with their parents than watch TV. Only the choice between the solitary pursuits of either watching TV (52%) or using the internet (48%) divides opinion significantly.



- **Relatively few online children (Index average 16%) across the world feel that their parents organise too many things for them to do outside school.** Only in China, Portugal, Russia ($\geq 36\%$ - and again, time-poor nations) are levels of agreement significantly higher.
- **Half of children (53%) interviewed around the world agree that 'I am very good at making friends',** with this social confidence being especially strong in Hungary (75%) but less pronounced in Japan and Poland (both 37%) and China and Belgium (both 43%).

TECHNOLOGY AND TOYS (CBQ1a, b, BQ1.1, CFQ1.7, CBQ10.4, CBQ11, CBQ12)

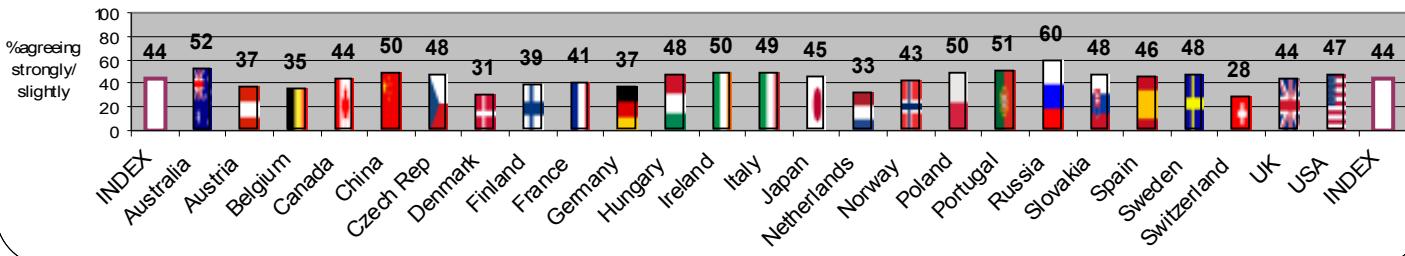
BACKGROUND

Research shows that where television and access to digital technology is available, children spend less time playing
 A study in Japan by Takeuchi (1994) showed that time spent playing outside the house by boys was inversely proportional to the time spent on video games
 Dr Barbie Clarke's research in the UK (Clarke, University of Cambridge, 2009) confirms this
 Children living in rural areas, with more freedom and opportunity to play outside, and with less adult intervention, are less likely to use digital technology
 It has been found that media characters have an effect on play in the choice of pretend themes, especially among boys

- **Although children's preferences for playing and interacting with other people rather than technology or toys are clearly demonstrated (sections 2.1, 2.2), the latter still hold considerable appeal to them:** playing computer games, watching TV and using the Internet all feature in the top 5 of their list of favourite pastimes (see section 2.1 graphic) – above the less technical pursuits of reading books, painting and drawing, listening to music and playing sport.
- **Furthermore, given the time pressures and logistical issues involved in letting their offspring play either with family or friends, it is perhaps understandable that many online parents in most countries surveyed agree that their children spend too much time watching TV or playing electronic games:** more than two in five globally (Index average 44%) agree with this, with parents in (in order of strength of agreement) Russia, Australia, Portugal, China, Ireland, Poland being most likely to.
- **Again, we see a strong correlation here with parental time-poverty;** all these countries bar Australia and Poland feature in our list of 'time-poor' nations (section

1.3), whilst almost all the lowest levels of endorsement here occur in identified 'time-richer' countries (Netherlands, Denmark, Austria, Switzerland and Finland; of all 'time-richer' nations, only the Czech Republic does not follow this pattern.)

BQ1.1: % of parents agreeing 'I think my children spend too much time watching TV or playing electronic games'



- Very few children around the world see 'play' and 'toys' as inextricably linked: only 9% (Index average) agree that 'When I play I always have to play with toys'.** Only in China (20%) and Russia (18%) do levels of agreement increase considerably.
- One third of online children (Index average 34%) meanwhile agree that 'Creating things is more fun than playing a computer game',** with children in Austria and Switzerland (both 44%) agreeing more strongly than most and children in Hungary (24%), Japan (22%) and Spain (24%) less likely to do so.
- When prompted, many children claim to see creative benefits in watching TV and/or playing computer games.** A slight majority in all countries surveyed (56% Index average, but rising considerably in China, Ireland and UK) agree that watching TV gives them lots of ideas and helps them to be creative, while slightly fewer (47%, and considerably more so in China, Denmark, Ireland and Spain) agree that playing games on their computers or games consoles gives them lots of ideas and helps them to be creative.

ASPIRATIONS (CGQ1)

BACKGROUND

Children do not necessarily aspire to be older, and are usually content with the age they are at. They do however develop fantasies about friendship and identity e.g. a 'pretend friend', is sometimes a feature between ages 3-6. Between 7-10 children develop many interests, and part of the drive to participate in activities is a wish and a belief that they will be good at something e.g. Playing football professionally, becoming a pop star, being a celebrity. Children at this age (middle childhood) are enthusiastic and altruistic – they like good causes such as saving the planet, protecting animals.

- Children aged 7-12 years in our 25 countries were also asked, at the end of their short interview, a single, wide-ranging question that invited them to tell us in their own words, 'If you could wish for anything, what would that be?'** % results for responses are not available, but all verbatim answers are. As might be expected with such a general question, a great range of subjects was addressed in responses. **The**

following selection of comments from UK respondents gives an indication of this breadth:

(Verbatim responses are available for all countries surveyed.)

"To be allowed to play on the games consoles more than I'm allowed to."

"To be an Olympic swimmer"

"That I didn't go to school"

"To have Sims 3 and a lot of money"

"A time machine. A library"

"A TV in my room"

"To be a big girl like mummy"

"To be a bike champ"

"(I wish that) we lived in New Zealand - it looks wonderful, beaches are great"

"To grow up to 16"

"My own laptop"

"Liverpool to win the league"

"To have a future with my friend Christopher"

"A pony"

"To live in the country and have lots of animals"

"To get a good job and be happy and have lots of holidays"

"That my school friends lived closer so that we could meet up and play more, especially at the park"

"I would wish that me and my mum could spend more time with each other and go to the park and bake things. I would also like my mum to take me to places like swimming pools and the zoo and farm. I would wish that we could all eat together like a proper family (with no TV.) I would like to do art with my mum and Christmas cards and decorations. (I would like to have some more takeaways as well.)"

"To go to a dance school and to be famous and rich"

"To meet Miley Cirus"

"To play for Man City"

"I'm happy as I am"

"For Pokemon to be real."

"To be a professional footballer with lots of money"

"To have my nanny back from heaven as she used to play with me a lot and let me do fun things! That's it"

"A brilliant life and loadsa friends!!!!!!!!!!!!!!!"

"I wish I could go and visit my big sister in America for a long holiday"

PLAY

3.1 MEANINGS OF AND ATTITUDES TO PLAY (FQ1, CFQ1)

BACKGROUND

There are as many theories of play as there are types of play, but generally it is agreed that there are two purposes, and these are not mutually exclusive:

Long term benefits

Children develop strengths and skills now that will be beneficial in childhood.

For example it is argued that friendship centres on play, which includes sharing and co-operation.

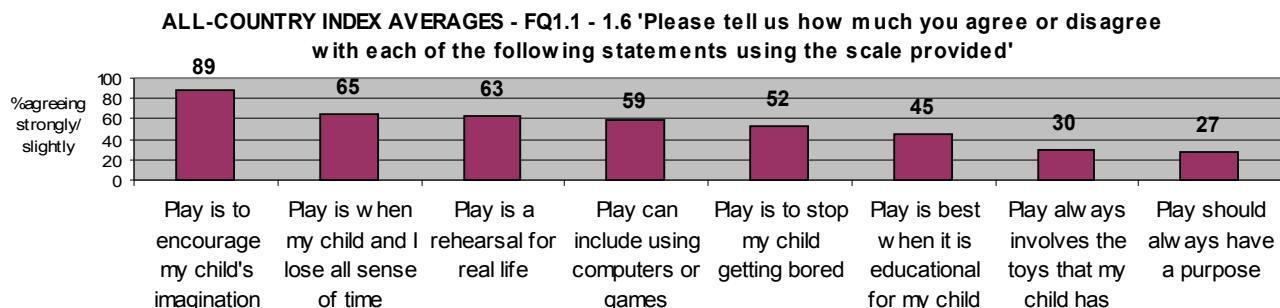
If children have not developed these skills by age 7 or 8, the transition to adolescence becomes more difficult, and isolation and loneliness can occur

Immediate benefits

Other theorists argue that play is more immediate, so that children learn skills that are immediately useful

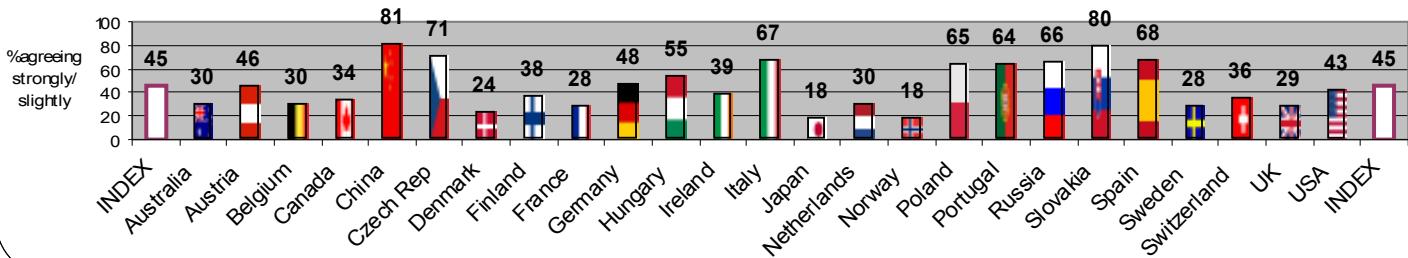
For example, how to communicate, use motor skills, learn social skills

- The word and idea of 'play' can represent many things to different people.** Indeed, we chose not to define 'play' for either the parents or children interviewed in our survey, preferring to allow each to interpret the concept as it applies to them and their lives.
- However, several questions about the nature of and attitudes to 'play' do allow us to understand more about its meaning around the world.**



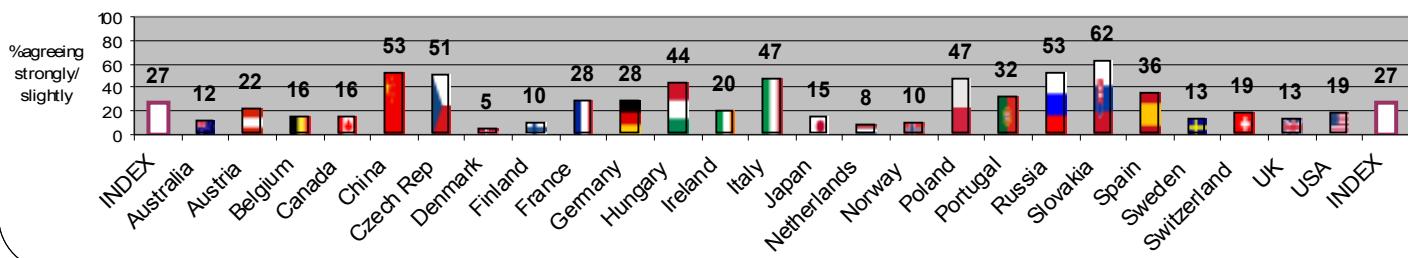
- At an overview Index average level, we can see that play, for most online parents around the world, is or can be to do with encouraging children's imagination and creativity – and should not necessarily always have a purpose nor necessarily involve toys.** Furthermore, for many, play can involve a sense of suspension of time. It might involve the use of computers or games consoles. Many see it as a rehearsal for real life, many as a way of preventing boredom – and many appreciate it most when they feel their child is learning from it.
- In practice though, perceptions of play vary widely around the world.** In particular, there is a polarisation of views about its value when it is educational in nature; two thirds or more of parents in (in order of strength of agreement) China, Slovakia, Czech Republic, Spain, Hungary, Russia, Poland and Portugal agree that 'Play is best when it is educational for my child' – whereas one third or fewer in Japan, Norway, Denmark, France, Sweden, UK, Australia, Belgium, Netherlands and Canada agree.

FQ1.3: % of parents agreeing 'Play is best when it is educational for my child'



- Parental attitudes to play and toys also differ considerably in eastern Europe and China compared to other countries surveyed:** more than half of online parents in Russia, Poland, China, Slovakia and Czech Republic agree that 'Play always involves the toys that my child has been given', compared to an Index average figure of 30%.
- Similar national differences also present themselves regarding whether play should always have a purpose:** almost half or more of parents in Russia, Poland, China, Slovakia and Czech Republic (as well as Italy) agree that it should, compared to an Index average of only 27%.

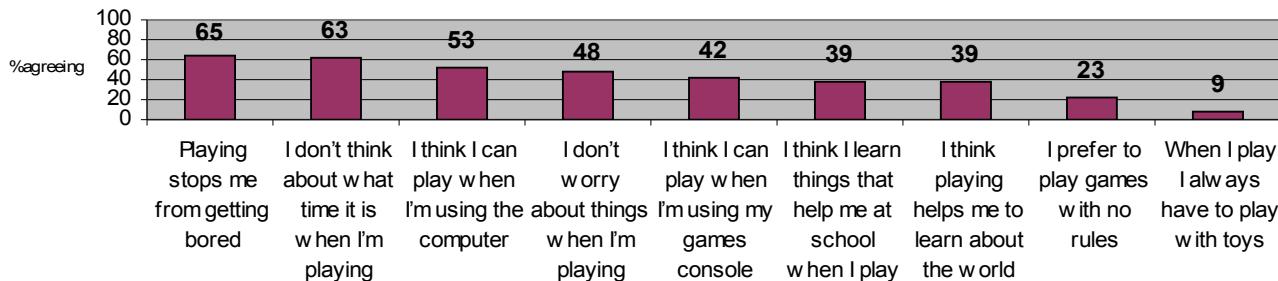
FQ1.2: % of parents agreeing 'Play should always have a purpose'



- There is however far greater agreement around the world about play's 'time-suspending' nature** (more than half of parents in every country surveyed agree that 'Play is when my child and I lose all sense of time') and about its role in encouraging imagination and creativity; more than three quarters of parents in every country agree that 'Play is to encourage my child's imagination and creativity'.
- And when considering what play means more directly to them, parents around the world are also more likely to agree with each other.** Four in five (Index average 83%) agree that 'I really enjoy playing with my children', with no fewer than 70% agreeing with this in any nation. Only one in five globally (Index average 20%) agree that 'I need to be persuaded to play with my children'; only in Japan, where a surprisingly high 70% agree with this, do levels exceed three in ten.
- Finally, almost universal agreement exists among parents about the developmental benefits of play.** Almost all (Index average 93%) parents interviewed agree that 'I think play is an essential and important part of the way a child develops', with no fewer than 87% agreeing in any one country.

- **Children's views of the meaning of play do not differ greatly from their parents', although they understandably place more emphasis on its role in diverting and stimulating them, rather than aiding education and development:** most (Index average 65%) agree that play stops them from getting bored and (61%) that they do not think about time when playing. Many feel that computers might (or might not) be involved (53%) and that it helps them have lots of ideas and to be creative (49%), while sizeable minorities feel that it helps them to learn about the world (39%) and can teach them things that are helpful at school (39%). Very few (9%) agree that play always

ALL-COUNTRY INDEX AVERAGES - CFQ1 (Children) 'Which of these do you agree with?'



- **Children in Denmark, Japan and Netherlands are meanwhile less receptive than most to the idea of play helping them to learn**, while those in the USA appear more appreciative of its role in diverting and entertaining them.

PLAY AND TIME (AQ3a-b, AQ9)

BACKGROUND

Play can be fun for adults, but it can also be a means of distracting children, in order to keep them occupied

There are 3 views of play:

'Free play' - completely unstructured

'Structured play' - steered towards certain activities, in the belief it will bring educational benefits

'Direct instruction' - prescribed - involving cognitive and literacy skills with a neglect of play opportunities

It could be argued that through structuring play, children move away from a true sense of play, and parents could be seen to be manipulating children for their own ends

On the other hand, children do benefit from this, and it can be a learning experience

A middle way is probably best - ie 'structured' with some educational benefits

- **Almost all children aged 0-12 in the countries surveyed spend most of their time outside school with one or both of their parents (Index average 90%).** Only in China (74% with parent(s), 24% with grandparents/in-laws) Norway (81% with parent(s), 10% with child's friends) and Portugal (83% with parent(s), 11% with grandparents/in-laws) does this pattern alter significantly.
- **In terms of their children's play time, parents around the world are still most likely to spend most of this with their children (Index 68%), but their children's friends (20%) assume a greater role here.** This is particularly the case in

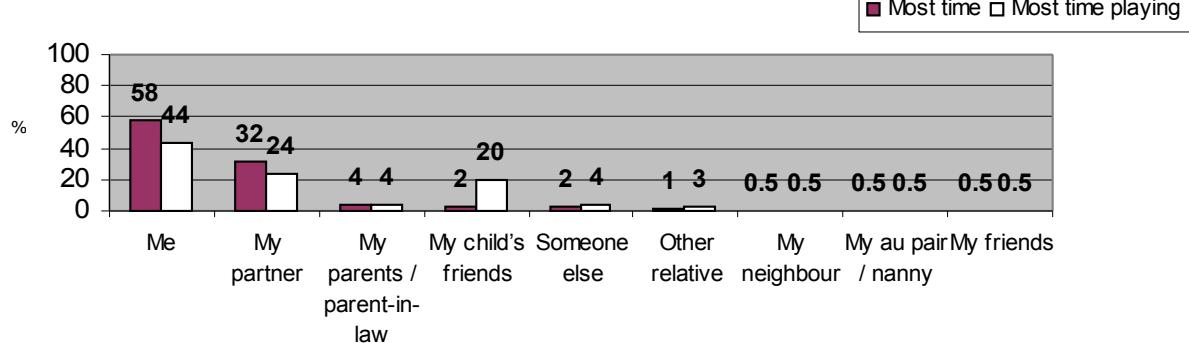
PLAYREPORT

International Summary

Scandinavian countries (Finland 37% with children's friends, Sweden 30%, Norway 29% Denmark 28%)

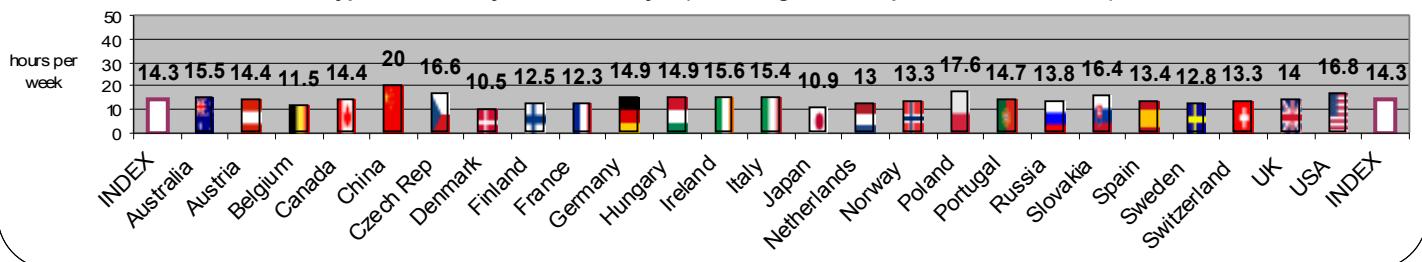
and in Netherlands (39%) and Germany (30%) – and less so in Australia, Belgium, China, France, Italy, Poland, Portugal, Russia and Slovakia (all <14% with children's friends).

ALL-COUNTRY INDEX AVERAGES - Parents: AQ3a 'Who spends most time with your child outside of school?' & AQ3b 'Who spends most time playing with your child outside of school?'



- The average online parent in the countries surveyed plays with their child(ren) for 2 hours per day (Index 14.3 hours per week). However, considerable variations exist at national level:** parents in Australia, China, Czech Republic, Ireland, Poland, Slovakia and USA all claim to play with their children for more than 15.5 hours per week, whilst those in Belgium, Denmark, France, Japan and Netherlands do so for 13 hours or less every week.
- In most countries, average time spent playing with children is higher among mothers than fathers** (see country reports for further detail).

AQ9: (parents) 'On average, for how much time do you personally play with your child(ren) on a typical weekday/weekend day?' (results grossed up to 'TYPICAL WEEK')



PLAY, EDUCATION AND DEVELOPMENT (CQ1.6, CQ1.7, CQ1.2, CQ1.5, BQ1.6, CQ1.5, CCQ1)

BACKGROUND

All forms of play could be regarded as educational

Children learn rapidly, and they learn from the important adults in their lives

Vygotsky (1978) argued that play materials help children separate themselves from concrete reality and make a distinction between actual objects, and what they are intended to represent (Hughes 2010)

While it is true that infants with access to a wide variety of play materials score higher on some intellectual measures, it is not proven that it is the play materials that create the higher measurements

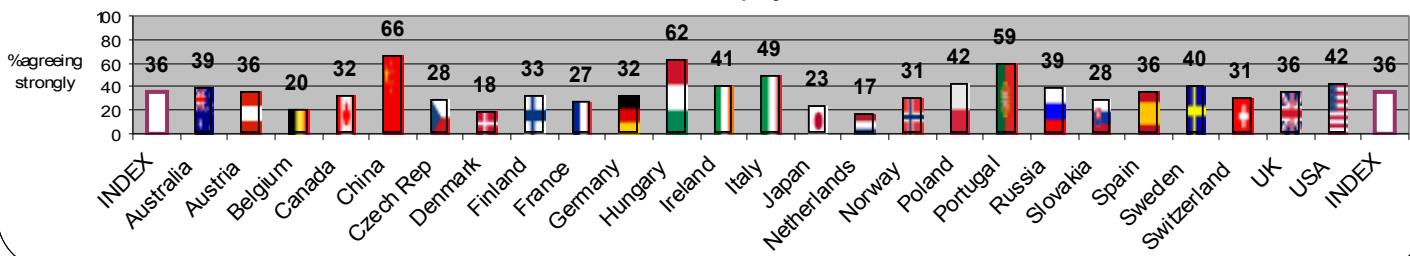
Psychologists believe that playing with different play materials helps children to become more creative e.g. Fantasy play

- We have already seen (section 3.1) the perceived importance – among both online parents and children themselves - of play to children's development.**

Play is almost universally seen as having a key role in encouraging imagination and creativity and – especially in Eastern and Southern Europe and China – is sometimes valued most by parents when it is educational in nature. But how else can play affect education and development?

- Firstly, we can recognise – as most parents do – that care should be taken when combining play and education:** there is already considerable concern among parents interviewed that 'children are put under too much pressure at school these days' (Index average 54% agreeing), especially in China, Germany, Hungary, Poland, Russia, Slovakia, UK and USA. It is heartening then that four in five parents around the world (Index average 80%, strongly agree average 36%) agree that 'children can learn more if they are encouraged to relax and have a playful outlook'. Agreement here is particularly strong in China, Hungary, Italy and Portugal.

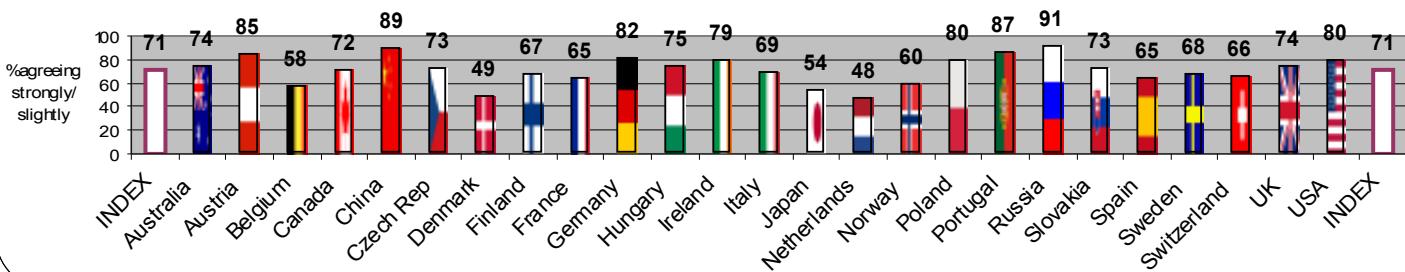
CQ1.7: % of parents strongly agreeing 'I think children can learn more if they are encouraged to relax and have a playful outlook'



- Similarly encouraging is the fact that a large majority of parents (Index average 78%) in countries surveyed agree that 'children should be allowed to play without it always having to be educational', (parents in Australia, Finland, Ireland, Sweden and UK agree particularly strongly here), whilst only very few parents (Index 17%) agree that 'I would prefer my child to learn things rather than play' (China, Italy, Russia and USA exceed average levels here).**

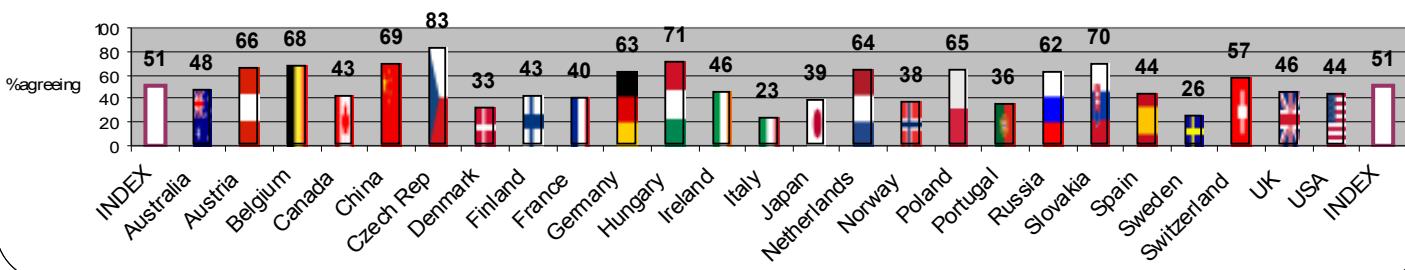
- Furthermore, remembering that almost all parents agree that 'play is to encourage my child's imagination and creativity' (section 3.1), nearly three quarters (Index 71%) of parents responding around the world agree that 'As a parent I feel I should encourage more creativity in the home'. What better way to do this than to play more with our children?

BQ1.6: % of parents agreeing 'As a parent I feel I should encourage more creativity in the home.'



- We leave the last word here to children: half (Index 51%) surveyed around the world agree that 'I would prefer to play than learn', with children in Austria, Belgium, China, Czech Republic, Germany, Hungary, Netherlands, Poland, Russia and Slovakia all agreeing with this significantly more strongly than average. However, children in Denmark, France, Italy, Japan, Norway, Portugal and Sweden all claim lower than average levels of agreement here.

CCQ1.1: % of children 7-12 years agreeing 'I would prefer to play than learn'



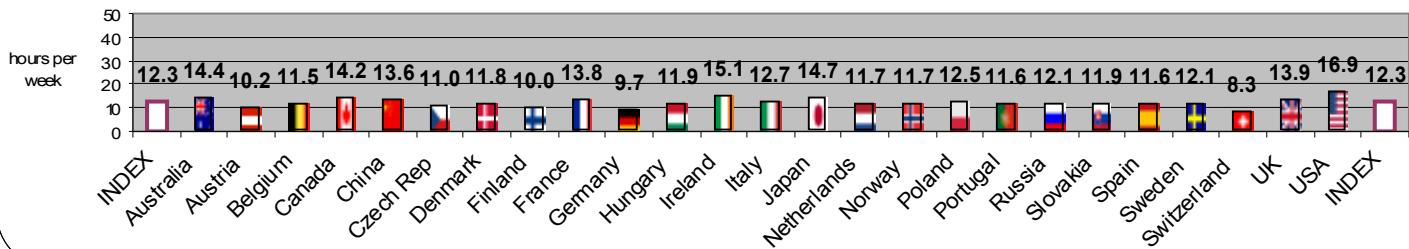
3.4 PLAY, TECHNOLOGY AND TOYS (BQ2, BQ1.1, BQ1.5, BQ1.3, CQ1.1)

BACKGROUND

Technology can be a form of play for children e.g. Websites that use the imagination, numeracy and literacy skills. Websites such as Club Penguin can prompt pretend or fantasy play with the adoption of an avatar. Concern has always been expressed about new technology, and some parents are challenged by digital technology – they do not understand it. We would advise parents that they should be closely involved with their child's engagement with digital technology, and that they teach them to stay safe on-line. There are many websites that can advise on this. Digital technology can be seen as a bridge to learning and communication.

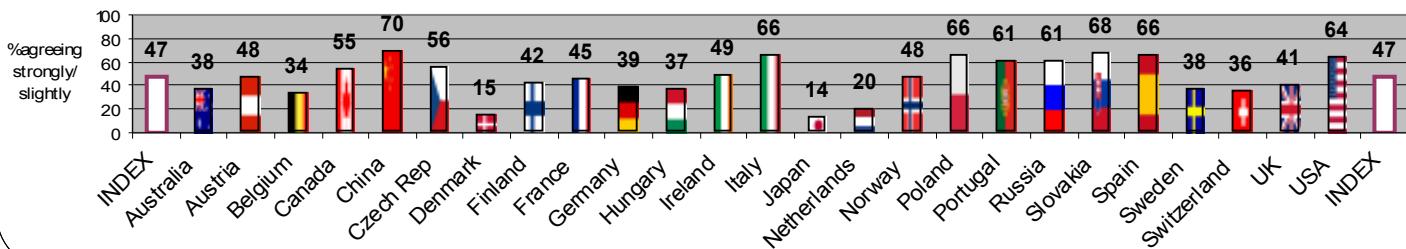
- Having established that parents and children rarely see toys as essential to the experience of play but that play can involve the use of computers or games consoles (sections 2.3, 3.1), we examine here the broader role of technology and educational toys in play and children's development. Parental opinion on these subjects is often divided.
- On average in all countries surveyed, online parents estimate that their child(ren) each spends 12.3 hours in a typical week watching TV and using games consoles and other electronic devices – slightly less time than they spend playing with their parents in the same period (Index average 14.3 hours)

BQ2: (parents) 'On average, for how much time does (each of) your child(ren) spend watching TV and using games consoles and other electronic equipment on a typical weekday/weekend day?'



- Almost half of parents online in countries surveyed express concern with this degree of exposure to electronic media: 44% (Index average) agree that 'my children spend too much time watching TV or playing electronic games' (levels are highest in Australia, China, Ireland, Poland, Portugal and Russia), while 43% agree that 'I feel my children rely on digital entertainment too much and should create more of their own play' (highest in China, Czech Republic, Ireland, Italy, Russia and Slovakia).
- However, a similar proportion (Index 40%) agree that - at least to some extent - 'I am happy for my children to be entertained by digital technology at home', with parents in Austria, China, Denmark, France, Russia, Spain and Sweden apparently most relaxed about this.
- Views on the use of educational toys are highly polarised: while an all-country average of 47% of parents agree that 'I like my children to play with educational toys like Baby Einstein and electronic dictionaries', only 1 in 5 or fewer parents in Denmark, Japan and Netherlands are in favour of such aids (with parents in Australia, Belgium, Germany, Hungary, Sweden and Switzerland also less so than most). However, three in five or more parents in China, Italy, Poland, Portugal, Poland, Slovakia and USA declare themselves in favour.

CQ1.1: % of parents agreeing 'I like my children to play with educational toys like Baby Einstein and electronic dictionaries etc.'



- Parents aged 18-34 years are significantly more likely to be positive towards educational toys than their counterparts aged 35-54, with an Index average of 53% agreeing 'I like my children to play...' compared to an average of 43% of parents of 35-54 years.