CHANGES IN CHILDREN'S MEDIA CONSUMPTION AND DEVICE USAGE HABITS (AGES 4-14)

Research Report

Data collection: October 2022

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EXECUTIVE SUMMARY

The most important findings and conclusions of the research

MANGAEMENT SUMMARY – FIRST ABOUT THE HOUSEHOLDS THEMSELVES

IT devices in the household

- Virtually every household has a television set
- Desktop computers appear more for upper elementary children, presumably as a result of distance education
- Tablets are very popular in families with small children, it is not uncommon for them to watch their favorite fairy tales and cartoons on YouTube
- Every household, without exception, has some kind of portable smart device, mostly a phone

The future

- The market for digital devices in general does not look promising
- Among the households of elementary school children, only one in six plans to purchase some kind of IT device, on the other hand, families with young children are more active
- We believe that we can detect two negative effects behind the decreasing demand and interest: a) the macroeconomic situation, in which we are already in full swing, may be a more important factor, but at the same time b) we have come out of an epidemic situation that could have favored the demand for IT devices

COVID effect

- Through distance education, the coronavirus epidemic may have played an important role in the increase in demand and spread of laptops
- The epidemic situation did not have much of a significant impact on the IT market

Children near devices

- Children generally have the highest proportion of access to television sets
- At the same time, there are devices to which their access increases significantly as they age
- Primarily desktop computers, laptops, notebooks, of course especially smartphones, and game consoles can also be classified here
- They can have access to tablets at a relatively young age

MANAGEMENT SUMMARY – AGGREGATE PICTURE BY AGE

Preschoolers and their families

- Their access is mainly to the TV and the tablet, but only with strong parental control
- Children accept that mom / dad's opinion is authoritative, "I can't go online alone" and only watch what mom or dad allows
- Children's bedrooms rarely have television sets
- At this age, we can't talk much about internet usage and online games
- If they do, they mainly visit YouTube with strong parental supervision, and parents visit fairy-tale sites (mese.tv, Mesemanók, Mesekincstár)
- As for fairy tales, the most popular at the moment is Paw Patrol, Bing the Bunny, but also among the fairy tales of Erika Bartos, Bogyó és Babóca is also popular at this age.
- Among the online and TV story channels are Minimax, NickJr, JimJam and the online VideaKid
- They try to spend their online time with skill-building board games, e.g. coloring, jigsaw, memory, color painting
- In preschool age, children can surf the Internet for an average of 30 minutes, and on weekends for an hour. In their case, the main purpose of surfing the net is to watch fairy tales
- Preschool children still focus specifically on offline games, with online and e-games in the background. Among their activities, the most common are activities with traditional games and role-playing

Lower elementary students and their families

- They have little access to non-linear content, in fact none of the streaming providers can be highlighted
- It can be felt that this is not yet the age when children should necessarily be "sat in front of the TV", at that time they are still trying to guide them towards more traditional forms of entertainment
- However, they can still sit in front of the TV for 1.5-2 hours a day
- Internet access is limited to the same amount of time as watching TV: on an average weekday, they spend an average of 1 hour on the Internet, and an average of 2 hours a day on weekends.
- The main purpose of surfing the Internet is to watch cartoons and other short, colorful, funny films, but only with strong parental supervision
- At the same time, 3 new browsing purposes appear compared to preschoolers: online games appear in a higher proportion, on the one hand as a learning aid, as well as help in learning a foreign language, and listening to music
- As age progresses, parental control eases, parents step back, but at that time parental input is still strong
- It is important to mention that TikTok appears with them, which already surpasses Facebook in this age group

Upper elementary students and their families

- We can safely say that this is a completely different world, independence has begun, and a bit of rebellion
- Tamás Vekerdy (the famous Hungarian psychologist) wrote about them that "Temporarily closed due to transformation" - and this could also be the motto of this study. As the child grows, the compromise is left to the parents - an exclusive parental decision in a quarter of the cases
- Parental control has weakened dramatically, in the vast majority of cases a compromise solution is reached, and this is even the best case
- The smartphone almost bursts into their lives: it seems as if the majority of children associate their first mobile phone with a round year, their tenth birthday. At the age of ten, every second person, at the age of 14, more than 80% have their own smartphone, and every fourth person has their own laptop
- On an average weekday, they hang out on the world wide web for almost 2 hours, and on weekends for almost 3 hours. Two out of three are on Facebook, but TikTok also has a strong presence, almost every second child uses it
- In this age, social media flourishes, the main purpose of surfing the Internet, the main activity is checking Facebook, Insta and TikTok profiles, posting, exchanging Messenger messages
- Minecraft dominates, Fortnite also has a strong presence
- Paid non-linear content: Netflix almost dominates
- Interestingly, the penetration of security software, filters, trackers and tracking software is very low

RISKS AND BENEFITS ACCORDING TO PARENTS - SUMMARY DIAGRAM

Advantages

Especially the acquisition of new knowledge, and the fact that in the process their horizons expand, they can discover new values.

Fewer people agree that it helps a lot in learning a foreign language, and that watching television expands and enriches the vocabulary (only every fourth parent agrees with these two last statements).

Dangers

They clearly see the main risk in the deterioration of children's physic condition. Watching TV takes time away from exercising, going outside, and playing sports.
It is also a serious risk that it degrades and relegates family and friendship relationships, the child's independent, creative "self-entertainment" and time spent with others.

Advantages

The supporting role played in learning is mentioned first by both target groups. The main difference is that, while the parents of the upper elementary students attach more importance to their role in maintaining relationships, the parents of the lower elementary students feel that this is less important, due to the age of the children.
Learning a foreign language is recognized as a positive benefit by both groups - more precisely by every third parent.

Dangers

A clear picture emerged, the two groups of parents perceive the same risks despite the children's different ages:

- less physical activity, they are rarely in the open air
- screen dependence, addiction
- the thinning and loosening of personal friendships and family relationships, the reduction of time spent with children of the same age, the weakening of the ability to "entertain oneself"

Advantages

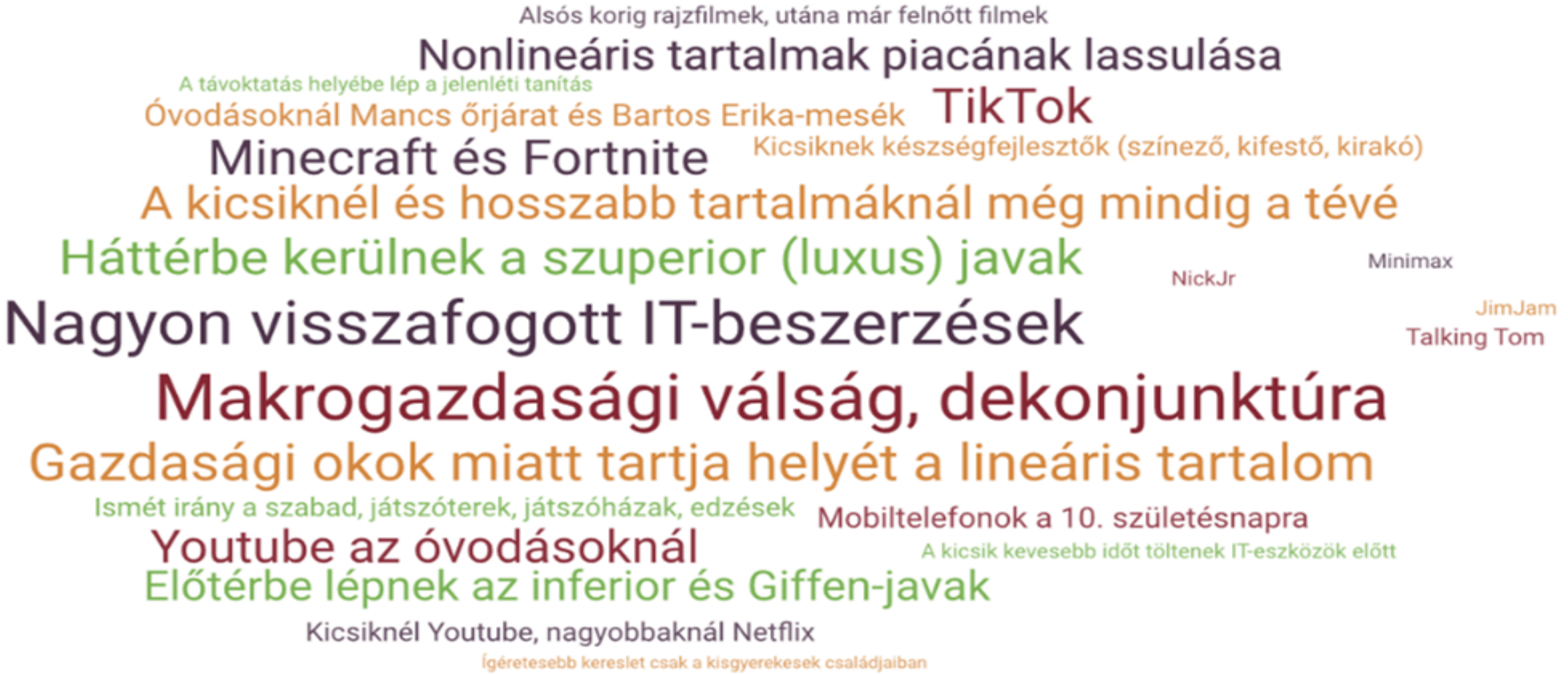
The advantage of being able to keep in touch with relatives tends to appear only in older children, and no other advantage was named.

Dangers

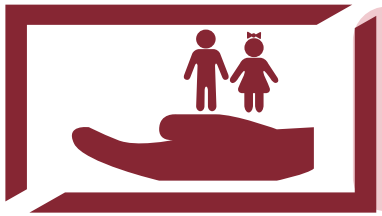
Social media is a much-feared area of the online space.

The strongest of these are online bullying and teenage social media addiction

IF WE HAD A CRYSTAL BALL... - PREDICTIONS FOR THE NEAR FUTURE (1-2 YEARS)



MANAGEMENT SUMMARY – PRESCHOOL AND ELEMENTARY TEACHERS



Preschool teachers

- Half of the preschools have smart devices, mostly smart TVs
- It is good news that in the vast majority of cases, the preschool manager provides technical support for installation, maintenance and use.
- It seems that they not only have the need for continuing education, but the professional background is also provided in the framework of further trainings
- Digital tools are mainly used in development sessions to display digital content
- The majority of preschool teachers believe that the use of laptops, computers and the Internet at this age is still harmful, while the use of mobile phones and the Internet is seen as the most dangerous.
- Although learning how to manage digital devices is essential over time, their usage at this age can have serious consequences, such as disrupting children's healthy daily routines, sedentary lifestyles, and taking time away from family and other social activities.
- Teachers see the dangers even more in the case of preschoolers, and they tend to agree with statements with a negative content
- Preschool teachers see worrying trends as children spend more and more time in front of the computer, the excessive usage of these devices leads to behavioral, neurological and integration problems, not to mention exhaustion

Elementary teachers

- Today, there is practically no school that does not have some kind of smart device, most often it is an interactive tablet or laptop. In most cases, they receive the necessary technical support for using these tools
- There are few schools where the usage of digital or mobile devices during school hours is not restricted: the main practice is that the mobile device must be handed in in the morning
- Teachers consider the usage of mobile phones, computers and the Internet to be the most harmful and at the same time the least safe
- They see the main advantage of watching TV as learning new knowledge, but they feel its dangers and risks are significantly more threatening.
- Like parents, teachers are mainly concerned about children's physical activity, they don't approve that they spend little time outdoors, it can seriously damage their social relationships and lead to integration problems. Overall, the child's personality and behavior may also be distorted
- They fear other problems in connection with digital devices: on the one hand, it is important to mention the danger of dependency and content that has a harmful effect on their development via the Internet. The threat of violence, sexuality and other negative examples
- Within the framework of the digital culture subject, they can acquire skills and knowledge that are also utilized within the framework of other lessons (except perhaps physical education)
- Students no longer like classic school tools and homework, they are more engaged by applications that help with this, such as LearningApps and WorldWall

METHODOLOGY AND SAMPLE

RESEARCH BACKGROUND, METHODOLOGICAL CONSIDERATIONS

CHANGES IN CHILDREN'S MEDIA CONSUMPTION AND DEVICE USAGE (AGES 4-14)

BACKGROUND OF THE RESEARCH:

- In children's media consumption, the usage of different devices and platforms changes and shifts more quickly in the direction of new **devices and platforms** than in older age groups.
- The focus of the proposed research is to explore this process, supplemented by topics related to media consumption habits.
- The research focuses on three groups: preschoolers, lower elementary school students and upper elementary students. In the first age group, we ask the parents of the children, the preschool teachers, parents and children in the second and third age groups (if there is a realistic possibility) as well as the lower elementary school teachers.

METHODOLOGICAL CONSIDERATIONS:

- With regard to the interviewers participating in the research, it is particularly important that only interviewers who have experience in interviewing children (and their parents) and who have participated in preparatory education participate in the research. Visiting families, interviewing children and parents required a **specific methodology**, and specific rules/regulations had to be observed. **Inspira Research has its own team of interviewers who "specialize" in child research.** Over the past 4 years, we have continued large-scale data collection in households with children, during which we learned the methodological characteristics of these researches, the importance of preparations, and learned about the challenges (NKI Kohorsz research, OGYÉI- child health research).
- We provided some kind of **gift** for the children.
- The interviewers had to evaluate the interviewing situations afterwards in a separate block of the questionnaire - the determination of the degree of parental control in the children's responses.

References:

KOHORSZ '18 magyar születési kohorszvizsgálat

OGYÉI Országos Gyógyszerészeti és Élelmezés-egészségügyi Intézet

RESEARCH TOPICS IN MORE DETAIL

CHANGES IN CHILDREN'S MEDIA CONSUMPTION AND DEVICE USAGE (AGES 4-14)

- What devices and platforms are currently used to consume (television, video) content? How has it changed recently?
- What devices are available to them? Which are in the household and for personal use? Internet access/bandwidth?
- Why does the child use/why does the parent allow the usage of the given device or content (goals of the child and the parent)?
- Is usage different on weekdays/weekends and by time of day? How typical is "watching" together and for which content or device/devices?
- To what extent does this depend/to what extent is this adjusted to the technical/financial possibilities of the household? Which of these are the most important aspects?
- What is the content selection process? (What is the role of the child/What is the role of the parent/the role of technical/financial possibilities/the role of content?)
- To what extent is the selection of (television) content linked to a channel?/If not, what is the selection linked to?
- To what extent do parents determine the selection of content?/Based on what criteria?/To what extent is this a joint decision with the child?/Do they monitor the content they consume?/Do they know monitoring software?/Do they use such? (Do they use e.g. NMHH's applications of this kind, age limit?)
- What is the "cool" content among children?/Who are the "cool" figures and actors? On what basis do parents moderate this? What is the gap (if any) between parents' and children's (value) choices?
- Role models (among older children)
- Usage of Internet and video games (What are the selection/"authorization" criteria)
- Internet usage of parents vs. of kids
- Knowing the dangers of internet usage - children vs. parents
- Advertising attitudes (how do they handle advertisements, which advertisements bother them the most, which are acceptable to them?)

PROPOSED RESEARCH METHODOLOGY

CHANGES IN CHILDREN'S MEDIA CONSUMPTION AND DEVICE USAGE (AGES 4-14)

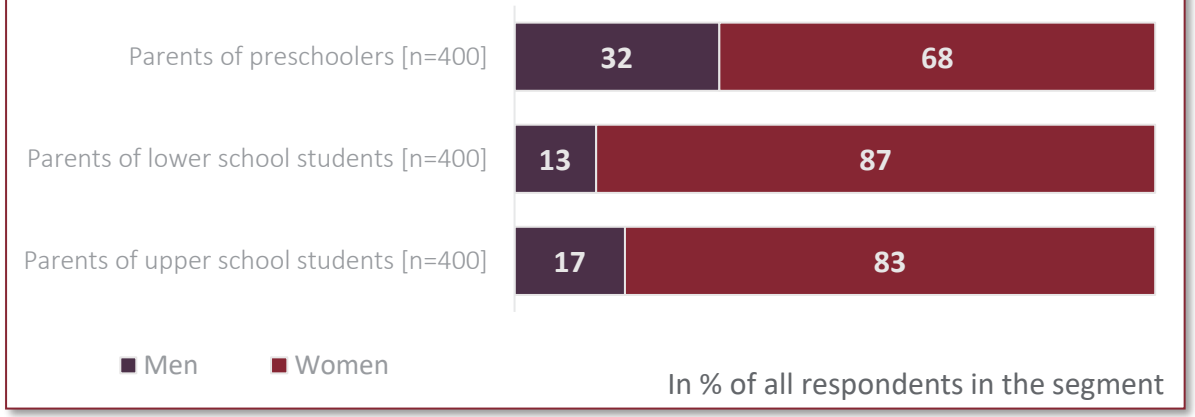
	TARGET GROUPS	DATA RECORD TYPE	ELEMENT NUMBER, QUESTIONNAIRE LENGTH
I.	PRESCHOOLERS (AGE 3-6/7), PARENTS OF PRESCHOOLERS AND PRESCHOOL TEACHERS	PRESCHOOLERS: **„FOCUS GROUPS"** WITH UPPER PRESCHOOLERS PARENTS OF PRESCHOOLERS AND PRESCHOOL TEACHERS – **ONLINE QUESTIONNAIRE**	PRESCHOOLERS: **2 "FOCUS GROUPS" (AROUND 60 MINUTES)** PARENTS OF PRESCHOOLERS: **400 PERSONS (APPROX. 25-30 MINUTES)** PRESCHOOL TEACHERS: **30 (APPROX. 30 MINUTES)**
II.	LOWER ELEMENTARY STUDENTS (AGE 6,7-11) AND THEIR PARENTS LOWER ELEMENTARY TEACHERS	INTERVIEWING LOWER ELEMENTARY STUDENTS AND THEIR PARENTS – **PERSONAL DATA COLLECTION** IN THE CHILDREN'S HOME (CAPI/TABLET)- QUESTIONNAIRE SUPPLEMENTED WITH AN ON-SITE SELF-FILLING BLOCK LOWER ELEMENTARY TEACHERS: **ONLINE QUESTIONNAIRE**	LOWER ELEMENTARY STUDENTS AND THEIR PARENTS: **500-500 PEOPLE (2X25-30 MINUTES)** LOWER ELEMENTARY TEACHERS: **40 (APPROX. 30 MINUTES)**
III.	UPPER ELEMENTARY STUDENTS (AGE 11-15) AND THEIR PARENTS	INTERVIEWING UPPER ELEMENTARY STUDENTS AND THEIR PARENTS: **PERSONAL DATA COLLECTION** IN THE CHILDREN'S HOME (CAPI/TABLET)- QUESTIONNAIRE SUPPLEMENTED WITH AN ON-SITE SELF-FILLING BLOCK	UPPER ELEMENTARY STUDENTS AND THEIR PARENTS: **500-500 PEOPLE (2X25-30 MINUTES)**

- The purpose of interviewing preschool teachers is primarily to validate and contextualize the quantitative results, so in their case a smaller number of items is sufficient. Among them, the online survey is conducted using a semi-structured questionnaire, using several open-ended questions. We do not recommend the online forum, because it is more relevant to the research topic if the respondents do not influence each other in this case.

THE RESEARCH SAMPLE

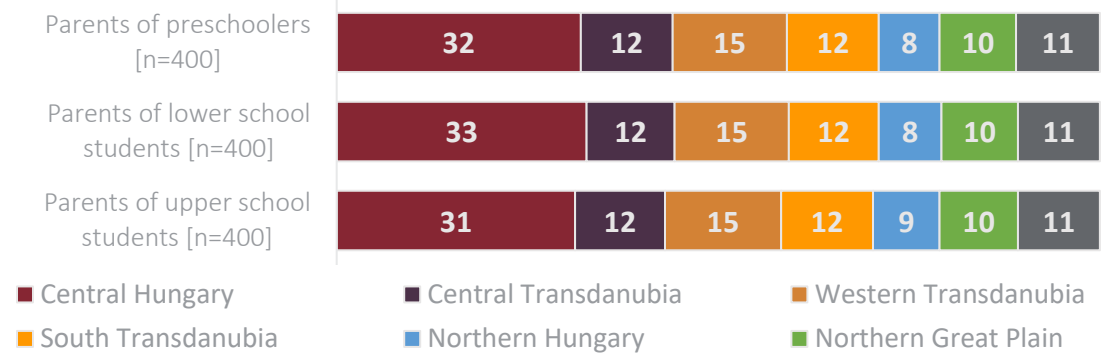
Age, education, and residence of the family of the parents interviewed in the different subsamples

Gender of respondent



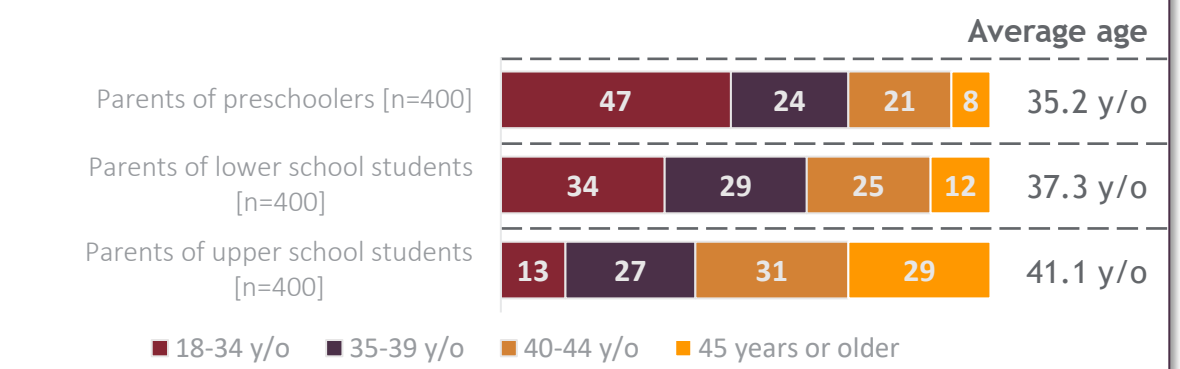
In % of all respondents in the segment

Respondent's region of residence



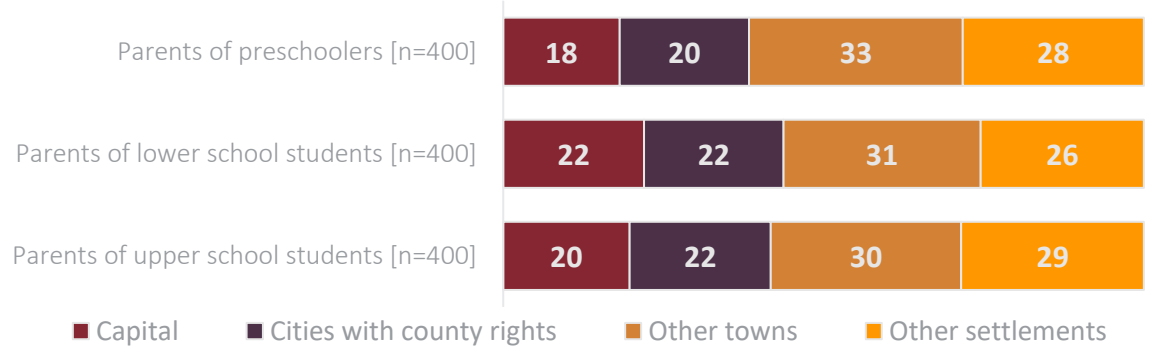
In % of all respondents in the segment

Age of respondent



In % of all respondents in the segment

Type of settlement of respondent's residence

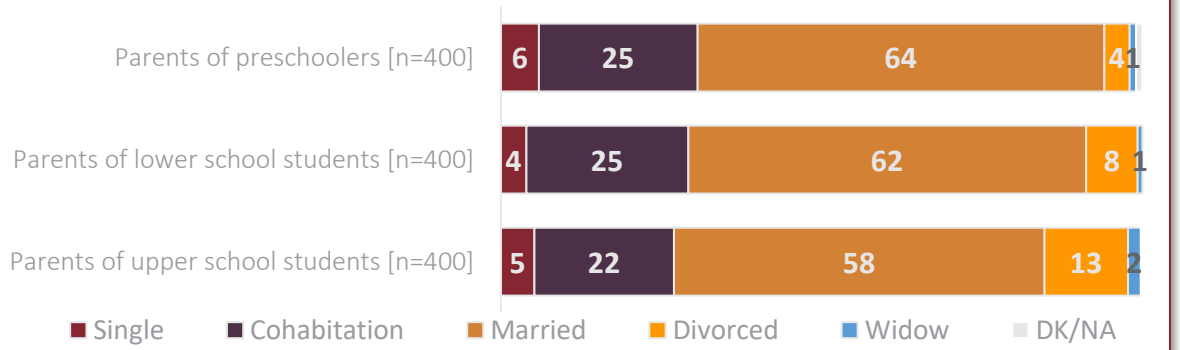


In % of all respondents in the segment

THE RESEARCH SAMPLE

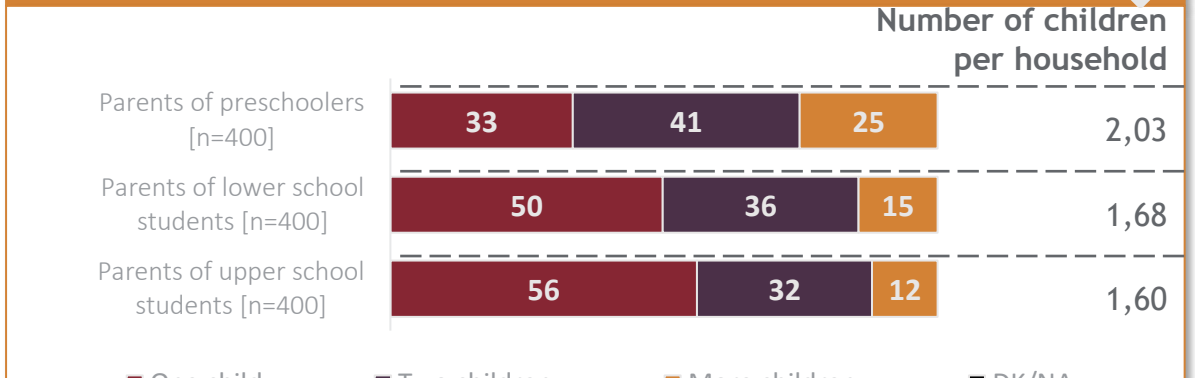
Complex presentation of households

Marital status of respondent



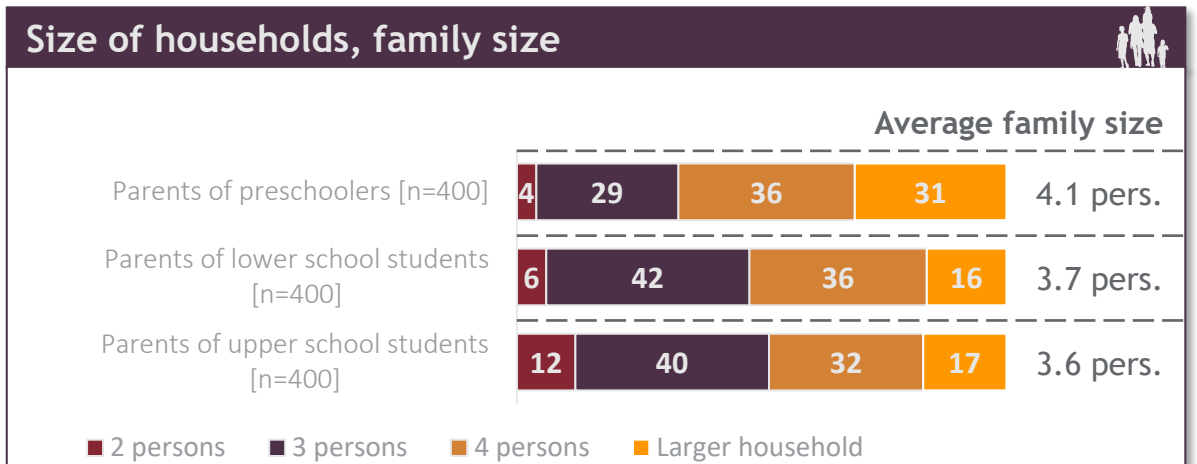
In % of all respondents in the segment

Number of children in the household



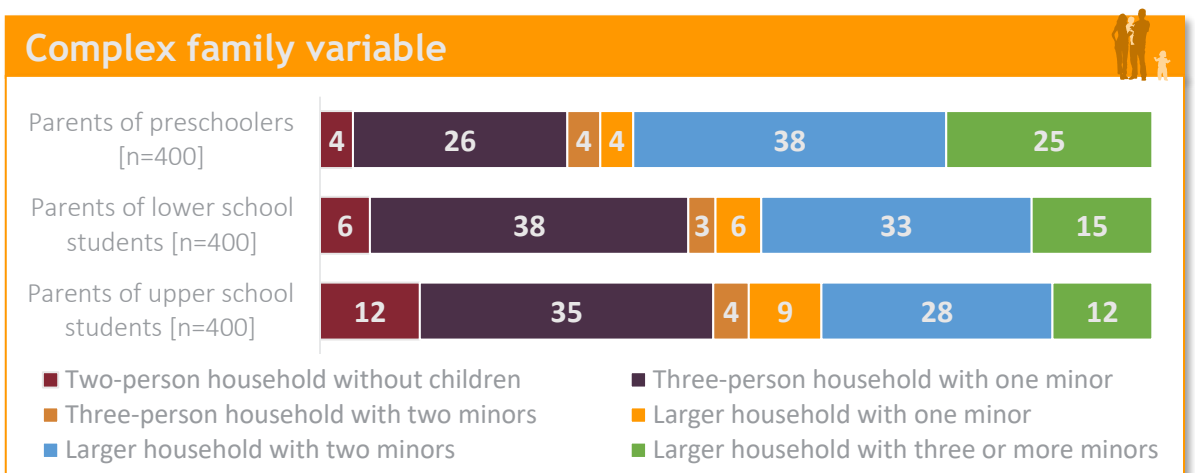
In % of all respondents in the segment

Size of households, family size



In % of all respondents in the segment

Complex family variable

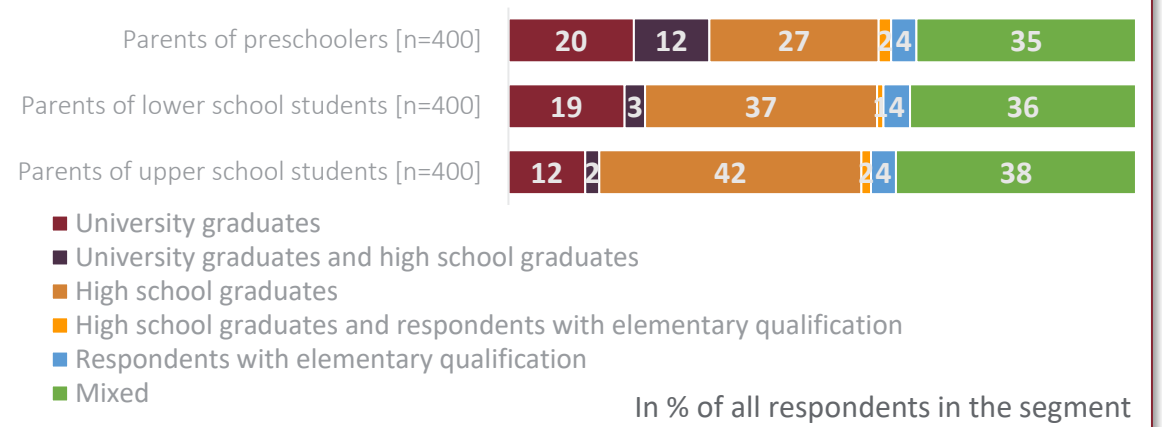


In % of all respondents in the segment

THE RESEARCH SAMPLE

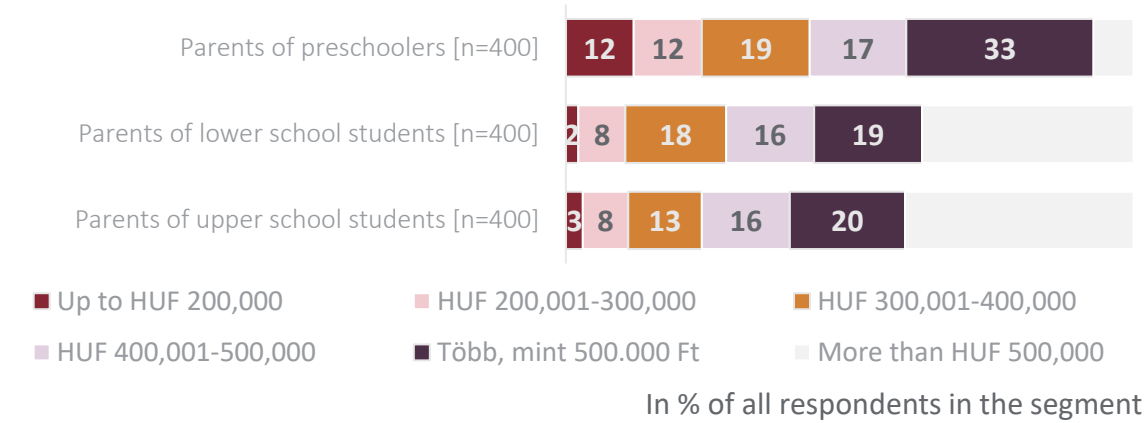
Living conditions, economic background and education of the household

Educational qualifications in the household



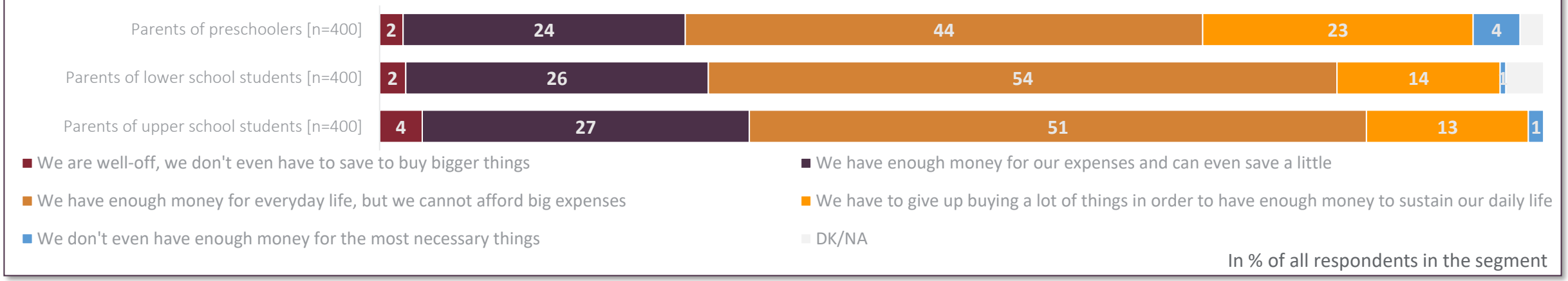
In % of all respondents in the segment

Net household income



In % of all respondents in the segment

Subjective well-being of the household



In % of all respondents in the segment

WHAT DO WE KNOW ABOUT THE CHILDREN THEMSELVES?

In the 400 "lower elementary students" households, there are a total of 419 lower elementary students, 48% of them boys, 52% girls
A total of 424 upper elementary students live in the 400 "upper elementary students" families, 52% are boys, 48% are girls

Preschoolers' sample	Average person per 100 households	Lower elementary students' sample	Average person per 100 households	Upper school student's sample
in 36% of families (39 children/100 families)	Children under 3 years	in 13% of families (13 children/100 families)	Children under 3 years	in 5% of families (5 children/100 families)
in every family (117 children/100 families)	Preschoolers	in 20% of families (21 children/100 families)	Preschoolers	in 13% of families (13 children/100 families)
in 27% of families (29 children/100 families)	Lower elementary students	**in every family(105 children/100 families)**	Lower elementary students	in 14% of families (16 children/100 families)
in 10% of families (11 children/100 families)	Upper elementary students	in 13% of families (15 children/100 families)	Upper elementary students	**in every family (106 children/100 children)**
in 5% of families (7 children/100 families)	High school students	in 12% of families (14 children/100 families)	High school students	in 17% of families (18 children/100 families)

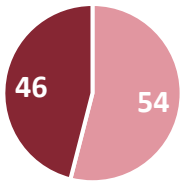
50% 50%

n=468

Preschoolers

Gender ratio in each subsample

Age distribution in the subsample

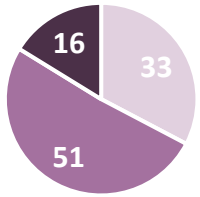


3-5 y/o 5-7 y/o *n=468*

48% 52%

n=419

Lower elementary students



6-7 y/o 8-9 y/o 10-11 y/o

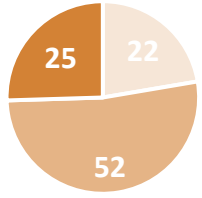
Gender ratio in each subsample

Age distribution in the subsample

52% 48%

n=424

Upper elementary students



10-11 y/o 12-13 y/o 14-15 y/o *n=424*

DEVICE USAGE IN THE HOUSEHOLD

Information communication and telecommunication devices found in the household and their location

Penetration of television subscriptions

Frequency of acquisitions generated by COVID

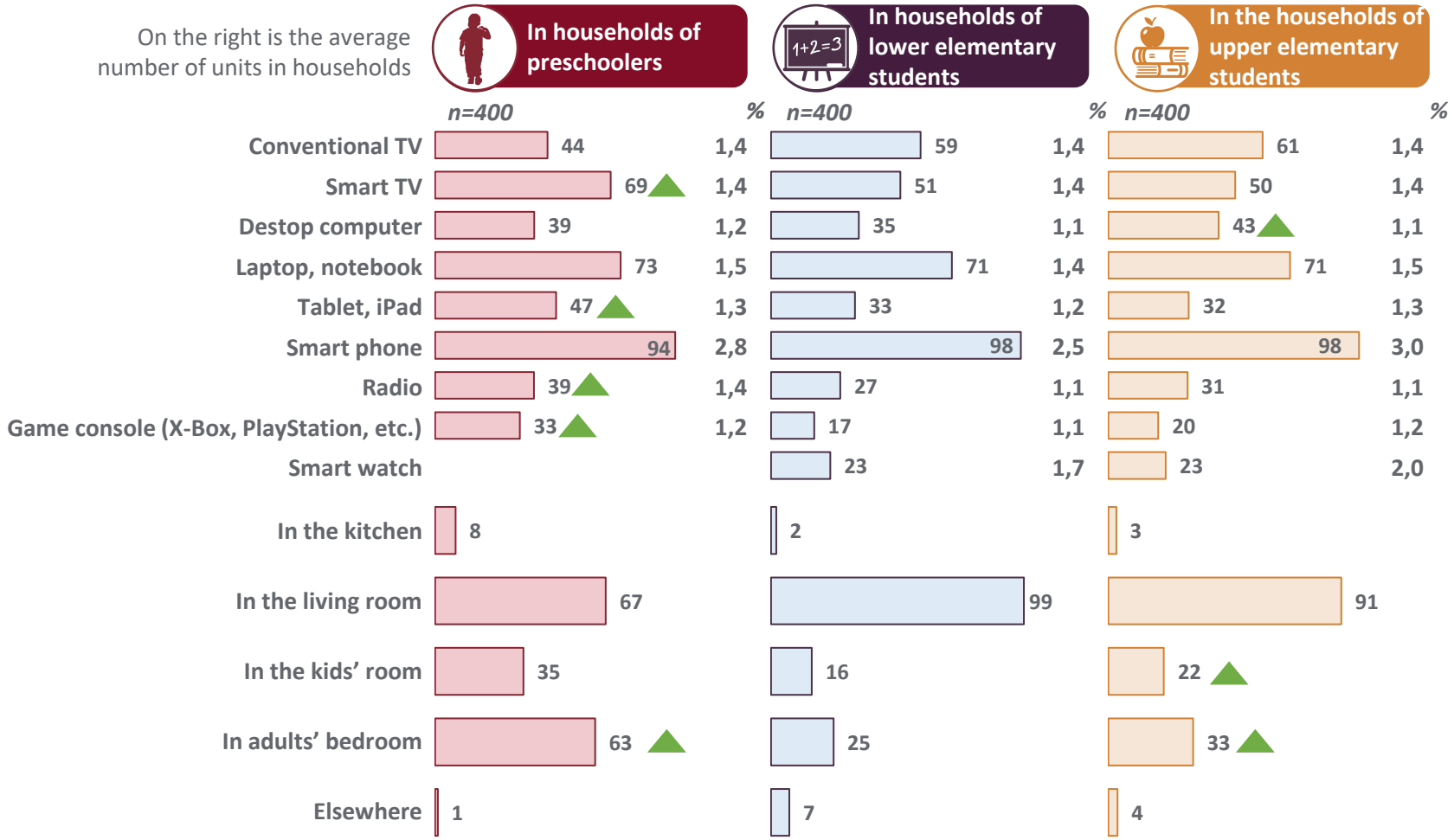
Plans in the near future

DEVICE PENETRATION - COMPLETE MOBILE PHONE COVERAGE

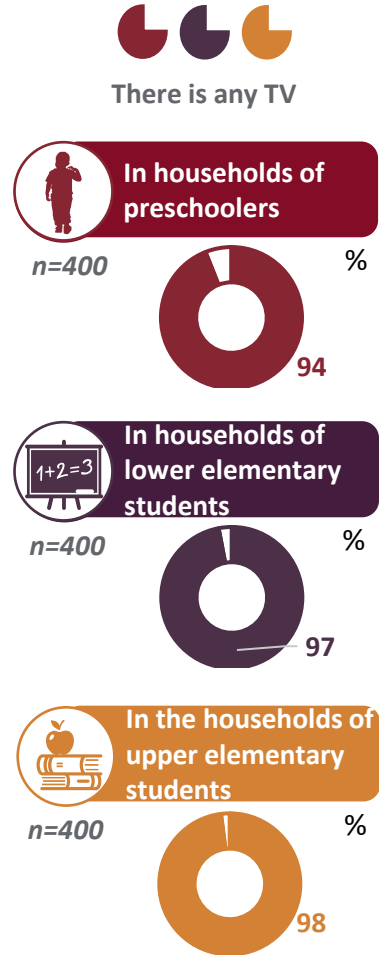
There is almost no household without a mobile phone, usually more like 3, but laptop penetration is also significant. Desktop computers appear more in the households of upper elementary students

▲ Significantly higher mentioning

On the right is the average number of units in households



Where is the TV located in your household?



Do you have the following information communication and telecommunication devices in your household? How many are there in your household? Base: all respondents in all samples [n=400]
Where is the TV set in your household? If there are more than one, please mark each room. Base: households that have a TV set [n=000 / 000 / 000]
Does your household have a TV subscription? Base: all respondents in all samples [n=400]

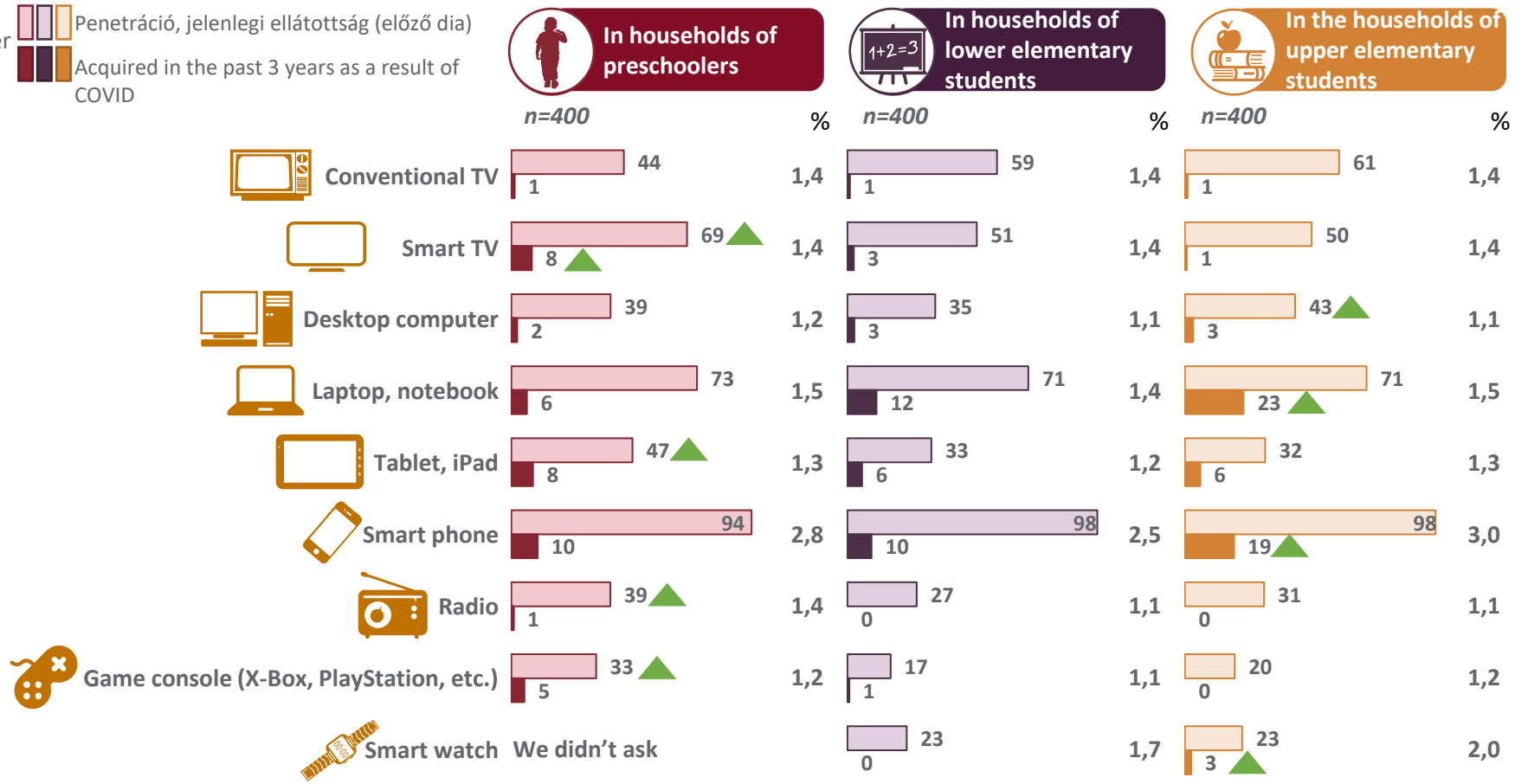
COVID IMPACT, PENETRATION - COVID MAINLY FAVORED LAPTOPS

Every household, without exception, has some kind of portable smart device, mostly a phone. The coronavirus has put laptops in a position through distance education, especially among upper elementary students.

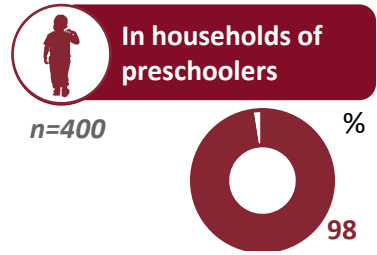
▲ Significantly higher mentioning

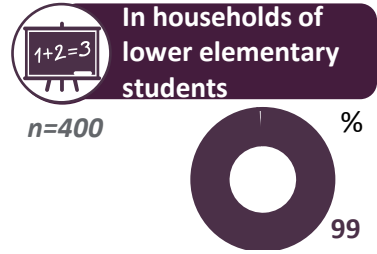
Penetráció, jelenlegi ellátottság (előző dia)

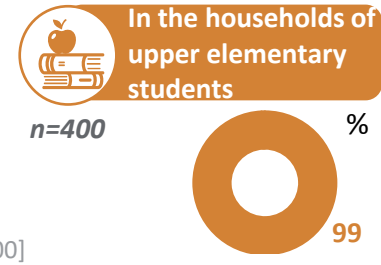
Acquired in the past 3 years as a result of COVID



There is any portable smart device







Do you have the following information communication and telecommunication devices in your household? How many are there in your household? Base: all respondents in all samples [n=400]
Among the devices purchased in the past 3 years, are there any that you bought specifically for your preschool / lower elementary / upper elementary child(ren) because of COVID? Base: all respondents in all samples [n=400]
Does your household have a TV subscription? Base: all respondents in all samples [n=400]

RESTRAINED FUTURE - MORE PROMISING AMONG PARENTS OF PRESCHOOLERS

It is probably also due to the more difficult macroeconomic situation, but the future market for digital devices does not look promising. Every sixth household is thinking about purchasing some kind of digital device, a significant part of which is a mobile phone, and laptops are also worth mentioning. The smart TV market may expand most promisingly among parents of preschoolers - maternity leave may play a role in this

▲ Significantly higher mentioning

Penetration, current device (previous slide)

Future plans

	In households of preschoolers n=400	%	In households of lower elementary students n=400	%	In the households of upper elementary students n=400	%
Conventional TV	44 / 4	1,4	59 / 2	1,4	61 / 1	1,4
Smart TV	69 ▲ / 10 ▲	1,4	51 / 2	1,4	50 / 3	1,4
Desktop computer	39 / 4	1,2	35 / 1	1,1	43 ▲ / 1	1,1
Laptop, notebook	73 / 7	1,5	71 / 6	1,4	71 / 5	1,5
Tablet, iPad	47 ▲ / 11 ▲	1,3	33 / 3	1,2	32 / 3	1,3
Smart phone	94 / 8	2,8	98 / 6	2,5	98 / 7	3,0
Radio	39 ▲ / 1	1,4	27 / 0	1,1	31 / 0	1,1
Game console (X-Box, PlayStation, etc.)	33 ▲ / 6	1,2	17 / 2	1,1	20 / 1	1,2
Smart watch	*We didn't ask*		23 / 3	1,7	23 / 3	2,0

Plan to purchase any media device

In households of preschoolers
n=400 %
34

In households of lower elementary students
n=400 %
18

In the households of upper elementary students
n=400 %
17

Do you have the following information communication and telecommunication devices in your household? Base: all respondents in all samples [n=400]
Is your household planning to purchase any of the following devices for your preschool / lower elementary/ upper elementary child(ren) in the near future? Base: all respondents in all samples [n=400]
Does your household have a TV subscription? Base: all respondents in all samples [n=400]

PRESENCE OF PAID MEDIA SERVICES IN HOUSEHOLDS

Penetration and presence of paid media services in households

Subscription plans in the future - proportion of people planning to subscribe

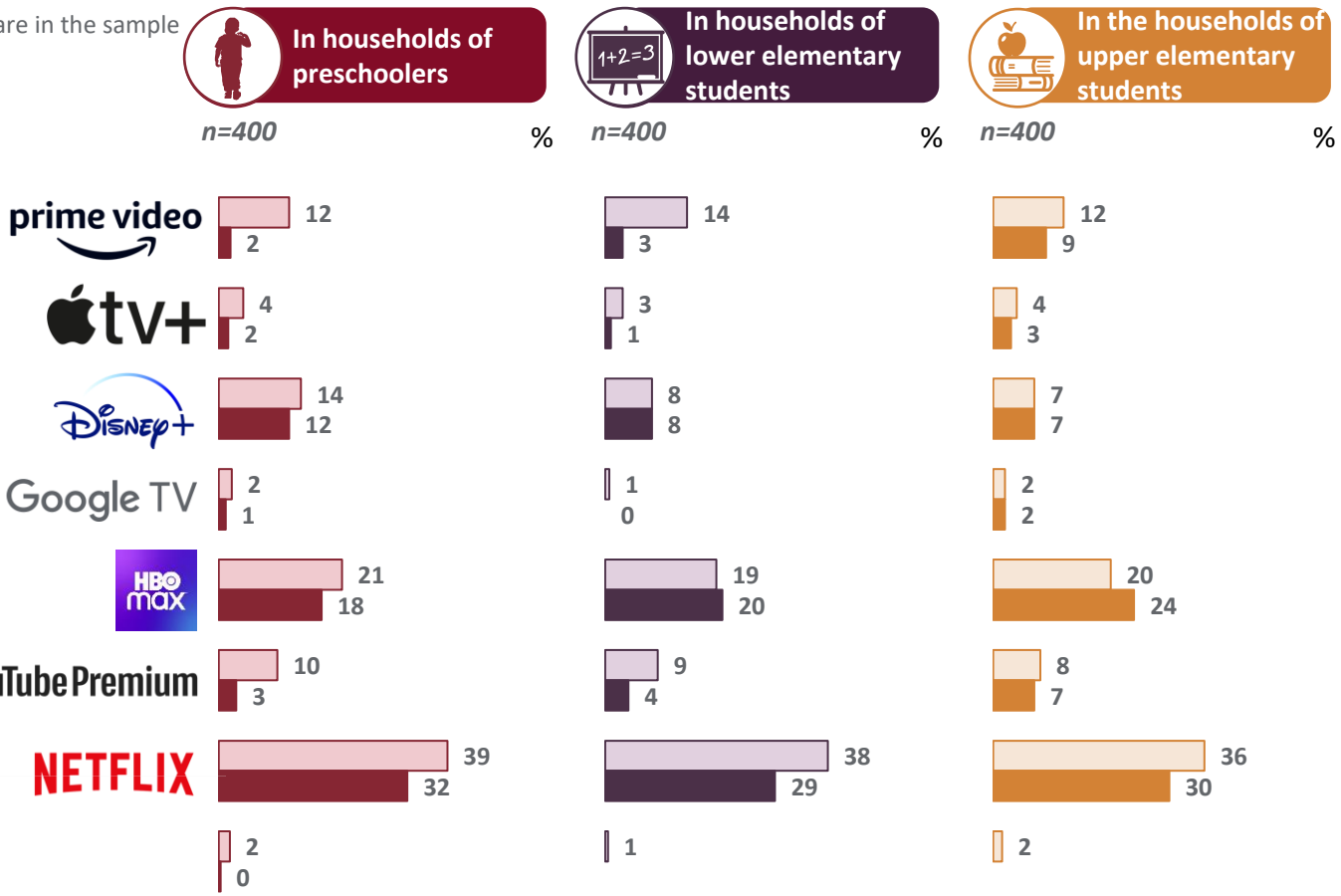
PAID CONTENT – NETLFLIX IS IN LEADING POSITION

Netflix is the market leader in all target groups, its main challengers are HBO Max and Disney (which is more followed by children - especially preschoolers).

▲ Significantly higher mentioning

Proportion of subscribers, share in the sample

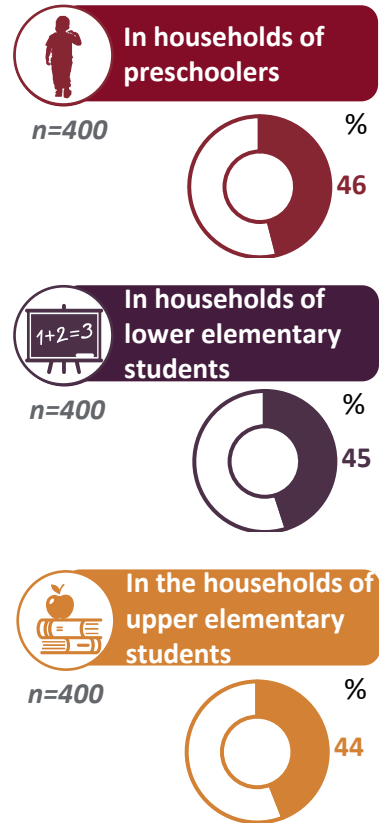
Children also can watch



Among other things, they mention:

- Spotify
- Telekom GO
- Direct One
- Vodafone TV

Rate of subscribers



Do you have any of the following paid content services (media services)? Please mark only those for which a regular fee is paid. Base: all respondents in all samples [n=400]What are the paid content services (media services) that your preschool / lower elementary school / upper elementary child(ren) also watch?
Base: all respondents in all samples [n=400]

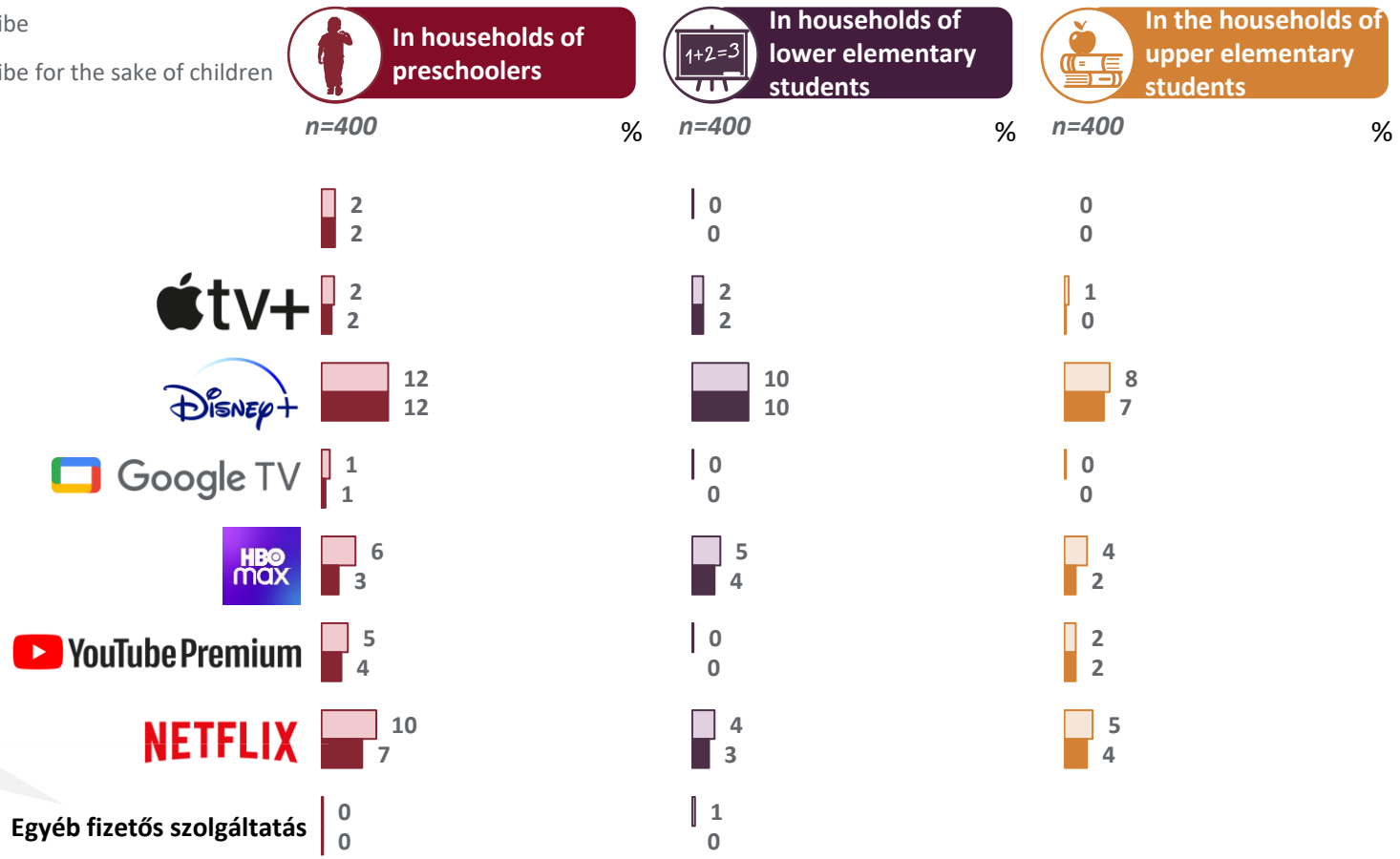
PLANS – SOMEWHAT HIGHER INTEREST AMONG PARENTS OF PRESCHOOLERS

In the households of older children, interest is lower. In our opinion, two unfavorable market events from the point of view of paid content have come together and reinforce each other: one is the unfavorable economic climate, and the other is the fact that alternative entertainment options have appeared as the epidemic subsides. At the same time, parents of small children can still be considered an important market.

▲ Significantly higher mentioning

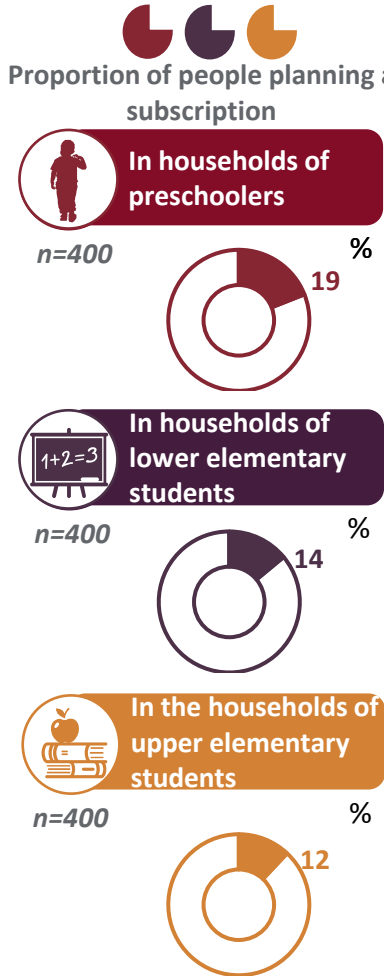
Planning to subscribe

Planning to subscribe for the sake of children



Among other things, they mention:

- Telekom GO
- Vodafone TV
- NFL Games



Do you plan to subscribe to a paid content service, such as a streaming service, in the next 1 year (more) with a monthly fee? Base: all respondents in all samples [n=400]
Which ones do you plan to subscribe to? Base: all respondents in all samples [n=400]
Is there a monthly paid content service that you plan to order specifically for your preschool / lower elementary/ upper elementary child(ren)? Base: all respondents in all samples [n=400]

CURRENT SUBSCRIPTION PENETRATION AND PLANS BY SEGMENT

Summary

	In households of preschoolers	In households of lower elementary students	In the households of upper elementary students
	n=400	n=400	n=400
Current penetration in % of all households	46%	45%	44%
Households planning (additional) subscriptions as a % of all households	19%	14%	12%

PARENTAL PRINCIPLES AND SAFETY PRECAUTIONS

Decision-making in the household regarding the usage of devices by children

Daily device usage considered ideal according to parents

Filter programs and use of child lock

Satisfaction with filter programs

DURATION OF DAILY USAGE - THE STRICTEST FOR GAME CONSOLES

As children get older, mainly desktop computers, laptops, smartphones and smart watches appear. Parents are the strictest regarding the use of game consoles, while the use of smart watches can be the least restricted. As the child grows, the parents are left with the compromise

▲ Significantly higher mentioning

Numbers on the right: percentage of children using the given device in %

In each case, on the basis of the number of children using the given device (in percentage on the right), we look at how many minutes on average their parents allow the usage of the given device

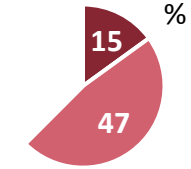
	In households of preschoolers n=400	In households of preschoolers In minutes	In households of lower elementary students n=400	In households of lower elementary students In minutes	In the households of upper elementary students n=400	In the households of upper elementary students In minutes
Conventional TV	51	24%	117	47	165	47
Smart TV	97	16%	100	42	94	38
Desktop computer	15	6%	64	16	84	26 ▲
Laptop, notebook	18	8%	102	30	105	49 ▲
Tablet, iPad	30	20%	100	23	61	20
Smart phone	41	27%	118	55	161	89 ▲
Radio	47	7%	123	5	78	7
Game console (X-Box, PlayStation, etc.)	19	10%	65	11	78	17 ▲
Smart watch			232	6	208	10 ▲

Who decides in your household whether child(ren) [...]

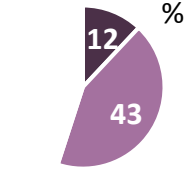
	It is determined by the parent, the person supervising the child (e.g. grandmother).		It is determined by the needs of the child(ren).		We are making a compromise	
[...] what kind of devices can they use?(	76	5	61	11	28	28	28	44
[...] how often can they use these devices?	66	7	59	10	31	26	24	50
[...] how long can they use the devices at one time?	66	5	58	10	32	26	24	50

Use the ban on digital devices as a discipline

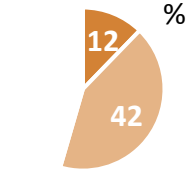
In households of preschoolers n=400



In households of lower elementary students n=400



In the households of upper elementary students n=400

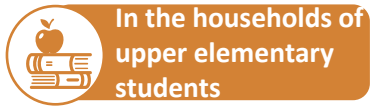


Who decides in your household whether your preschool / lower elementary / upper elementary child(ren) ...? Base: all respondents in all samples [n=400]
In your opinion, how long can a preschool / lower elementary/ upper elementary child watch / use the following devices? Base: all respondents in all samples [n=400]Do you ever use a ban on digital devices to discipline your preschool / lower elementary/ upper elementary child(ren)? Base: all respondents in all samples [n=400]

SAFETY PRECAUTIONS - FILTER PROGRAMS, CHILD LOCKS, TRACKER

Preschoolers in particular, but even lower elementary students are significantly better protected on almost all devices than upper elementary students, there are two exceptions to this: upper students are better followed by tracker software on their portable smart devices, but this could also be explained by the fact that upper elementary children are already more often go out alone

▲ Significantly higher mentioning



Presence of filter programs on individual devices

	Base on the right	N=	Base on the right	N=	Base on the right	N=
Smart TV	59 ▲	276	10 ▲	203	4	199
Streaming service	42 ▲	262	20 ▲	79	4	95
Desktop computer	48 ▲	155	12	138	10	173
Laptop, notebook	40 ▲	291	11 ▲	284	7	285
Tablet, iPad	54 ▲	190	17 ▲	132	7	126

Base: in all cases, households with a given device, so all % values are based on households with a given device.
In **all cases, the base is shown on the right.**

Presence of a child lock on some devices

Smart TV	We didn't ask		13 ▲	203	5	199
Streaming service	We didn't ask		24 ▲	79	3	95
Desktop computer	We didn't ask		10	138	5	173
Laptop, notebook	We didn't ask		13 ▲	284	4	285
Tablet, iPad	We didn't ask		12 ▲	132	5	126

Base: in all cases households with the given device, so all % values are based on the households with the given device.
In all cases, the base is shown on the right.

GPS-tracker

Smart phone	We didn't ask		12	392	19 ▲	393
Smart watch	We didn't ask		13	93	24 ▲	90

Used filter and security programs

- AdBlock
- Adobe
- Avast
- Qustodio
- Norton Family
- Children Lock
- Control Parental
- Family Link / Guard / Kids

- Avast
- Dolphin Knight
- ESET
- Family Link
- Famisafe
- Google Family
- KidsPlace
- Panda
- Norton és Windows Family

- Avast
- Dolphin Knight
- Family Link
- Famisafe
- Find My Kids
- Kids
- Qustodio
- Panda
- Security Kid

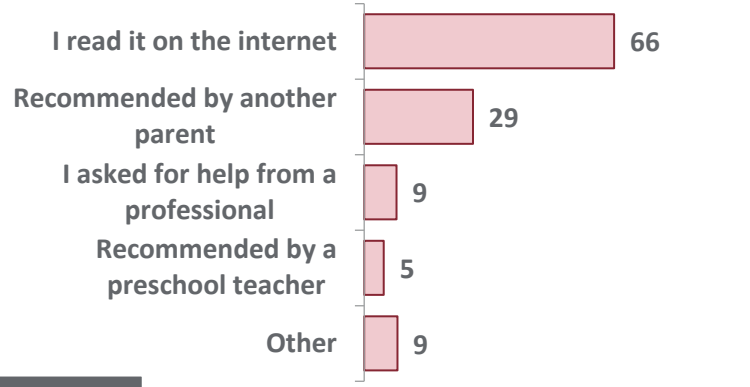
Do the devices have a filter program, a child lock, or perhaps a tracking program?
Is there a filter program set on the devices? Are child locks set on the devices?
What filter programs are used?

SAFETY PRECAUTIONS - THEY MAINLY FIND INFORMATION ON THE INTERNET

They mainly look up safety programs online, and parents often discuss them among themselves, this is the case in all age segments. There is probably not much opportunity to discuss such issues with the teachers, and they may feel that this is more of a private, family matter

In households of preschoolers

n=258 [those who mentioned any filtering program] %



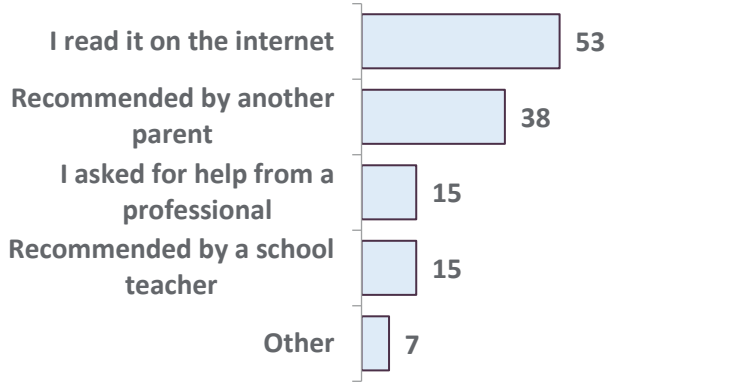
Satisfaction

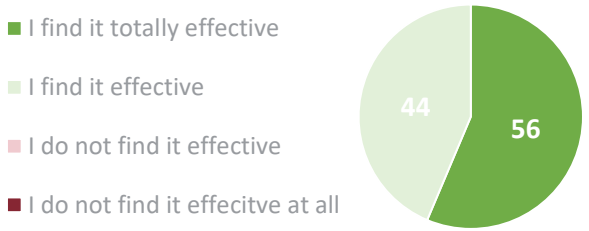
Penetration

Filter programs, child locks, followers
65%

In households of lower elementary students

n=55 [those who mentioned any filtering program] %

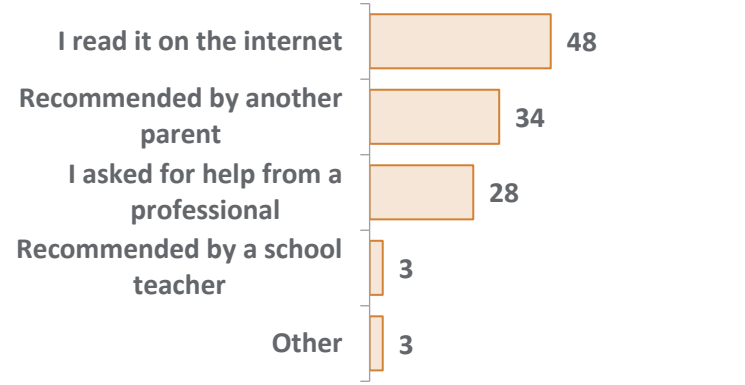




Filter programs	Child locks
14% ▲	15% ▲

In the households of upper elementary students

n=29 [those who mentioned any filtering program] %



Filter programs	Child locks
7%	6%

How did you find out about the used filter program? Base: those who use a filter program
How effective do you think the filter program you are using is? Base: those who use a filter program [n=400]

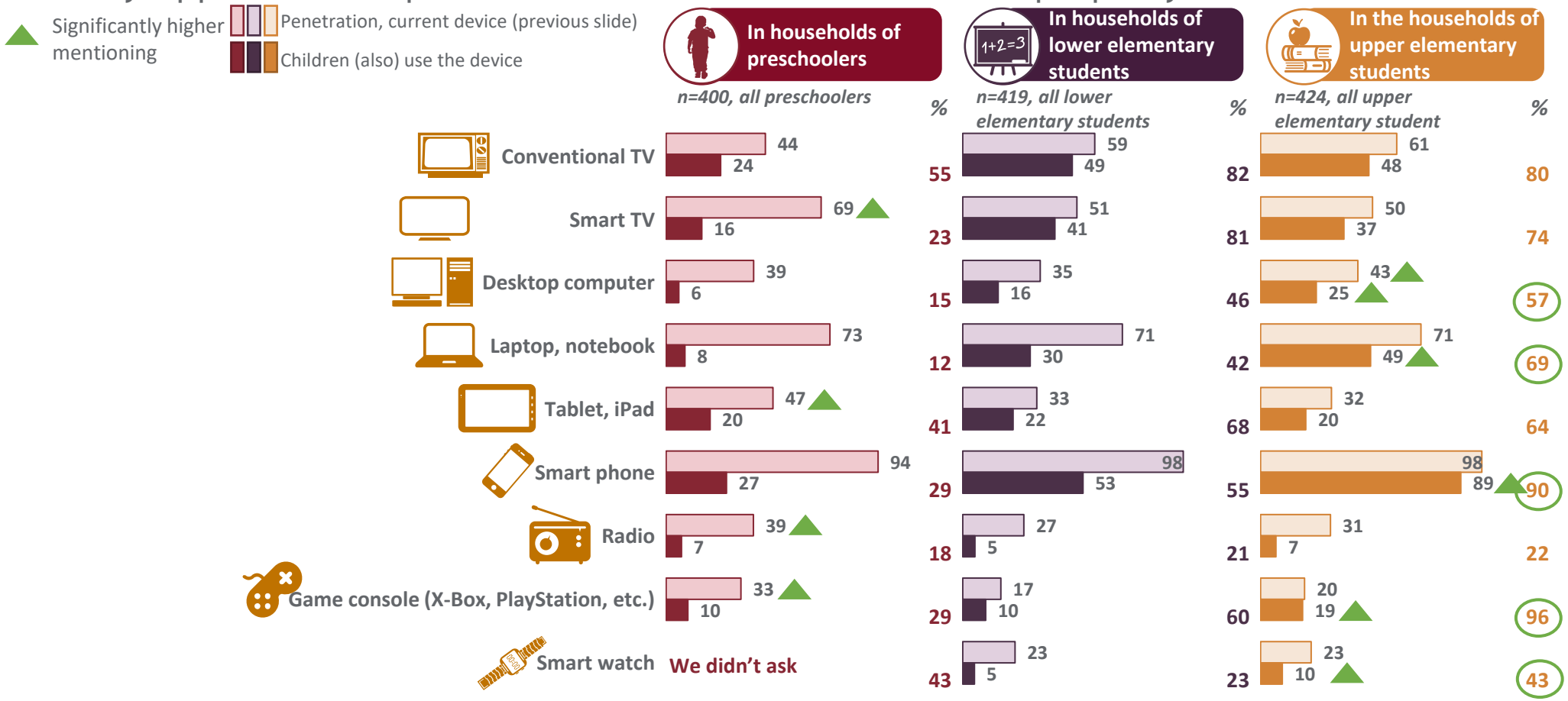
USED DEVICES FOR CHILDREN AT DIFFERENT AGES

Asset penetration in certain life stages and ages

Children's device usage in general and without parental supervision

DEVICE PENETRATION IN HOUSEHOLDS AND DEVICE USAGE BY CHILDREN

Children mainly have access to desktop computers, laptops, smartphones and game consoles in increasing proportion as they age. In addition to having fun, they will obviously have access to desktop computers and laptops for learning, while smartwatches and smartphones as portable smart devices can already appear in the possession of children as their own property.



Number on the right:
In what proportion of families with a given device do children also use or can use the given device

Do you have the following information communication and telecommunication devices in your household? How many are there in your household? Base: all respondents in all samples [n=400]
Which devices do your preschool / lower elementary/ upper elementary children use? Please tick all of them. Base: all preschoolers [n=000], all lower elementary students [n=419], all upper elementary students [n=424]

CHILDREN'S DEVICES: THE PHONE "STARTS" FIRST, THEN THE LAPTOP

Of course, the penetration of all devices is strongly influenced by the age of the children. Smartphones are the first to appear in greater proportion, at the age of 7, every fourth child already has one. The laptop is the device that arrives in the second wave: every fourth 12-year-old has his/her own laptop

▲ Significantly higher mentioning

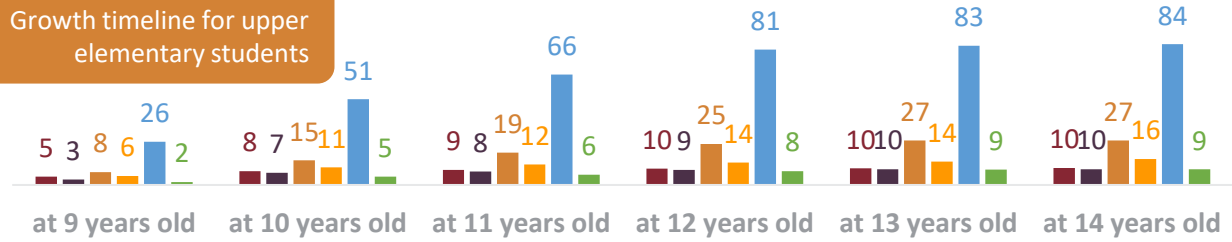
	In households of preschoolers n=468, all preschoolers	% M	In households of lower elementary students n=419, all lower elementary students	%	In the households of upper elementary students n=424, all upper elementary students	%
Conventional TV	5		5	6,9	11 ▲	8,5
Smart TV	*Measured the TVs together*		6	6,4	10 ▲	8,9
Desktop computer	2		3	6,7	9 ▲	9,9
Laptop, notebook	5		7	7,0	26 ▲	10,1
Tablet, iPad	10		14	7,0	16	9,6
Smart phone	22		39	7,4	84 ▲	9,8
Radio	*No measure it with preschoolers*		1	6,0	1	9,8
Game console (X-Box, PlayStation, etc.)	*No measure it with preschoolers*		6	7,0	13 ▲	9,1
Smart watch	*No measure it with preschoolers*		5	7,6	9 ▲	10,8

On the right: at what age did they receive it on average - we did not ask for preschoolers

TV
Desktop computer
Laptop
Tablet
Smart phone
Smart watch

Growth timeline for lower elementary students

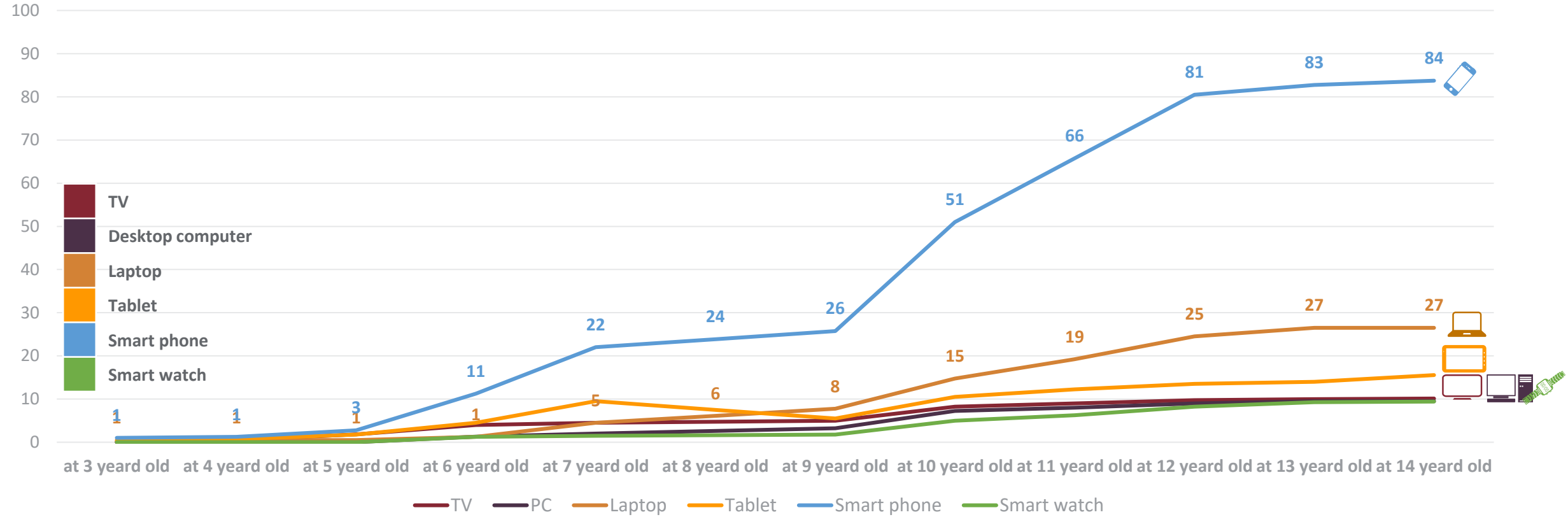
Growth timeline for upper elementary students



Do your preschool / lower elementary/ upper elementary children have their own [...] device? Base: all preschoolers [n=000], all lower-schoolers [n=419], all upper-schoolers [n=424]
At what age did your lower elementary/ upper elementary child(ren) receive the devices? [We didn't ask in kindergarten.]

DEVICE OWNERSHIP IN CHRONOLOGICAL ORDER: MANY CHILDREN GET THEIR FIRST MOBILE AT THE AGE OF 10

Of course, the penetration of all devices is strongly influenced by the age of the children. Smartphones are the first to appear in greater proportion, at the age of 7, every fourth child already has one. The laptop is the device that arrives in the second wave: every fourth 12-year-old has his own laptop. In the case of smartphones and laptops, the big breakthrough occurs at the age of 9-10. It seems as if most children associate their first mobile phone with a round number, their tenth birthday. In contrast, the laptop peaks at roughly 25%, meaning that every fourth student will have a laptop



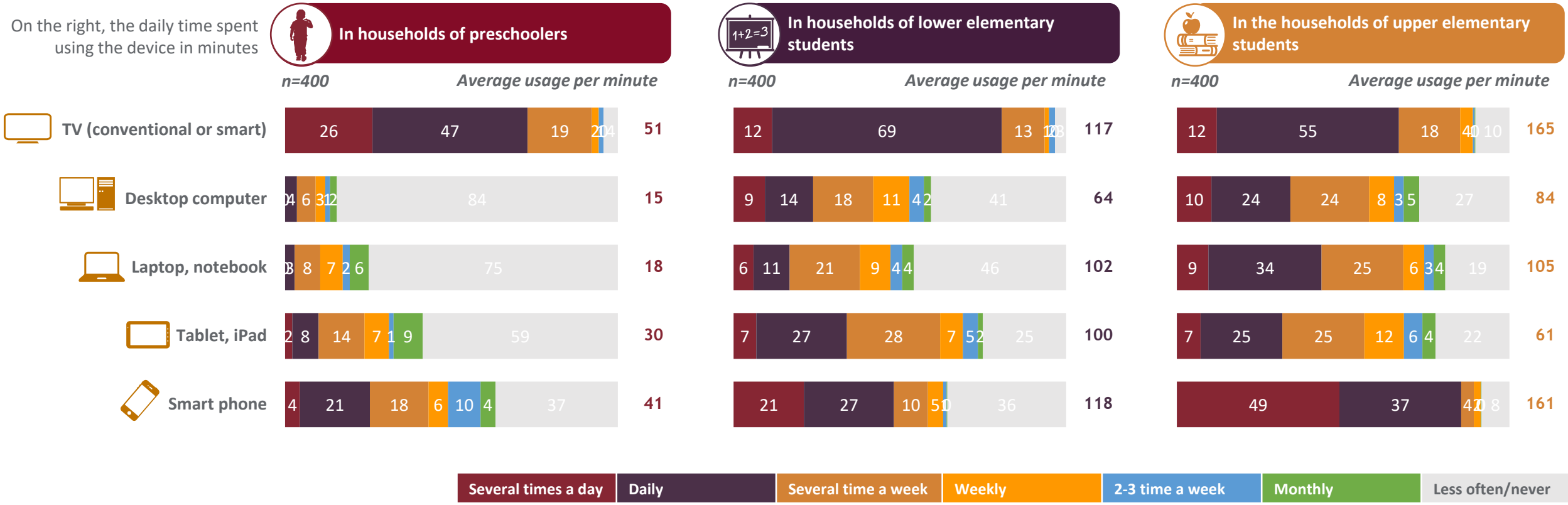
Do your preschool / lower elementary/ upper elementary children have their own [...] device? Base: all preschoolers [n=000], all lower elementary students [n=419], all upper elementary students [n=424]
At what age did they get lower elementary/ upper elementary child(ren) the devices? [We didn't ask in preschool age.]

REGARDLESS OF THE AGE OF THE CHILDREN, THE FOCUS IS ON TV

Apart from children's age, TV plays a key role in households.

Younger children are allowed – of course – to watch much less TV, less than 1 hour a day, while lower elementary school children can watch 2 hours, upper elementary students watch 2 and a half hours a day

On the right, the daily time spent using the device in minutes

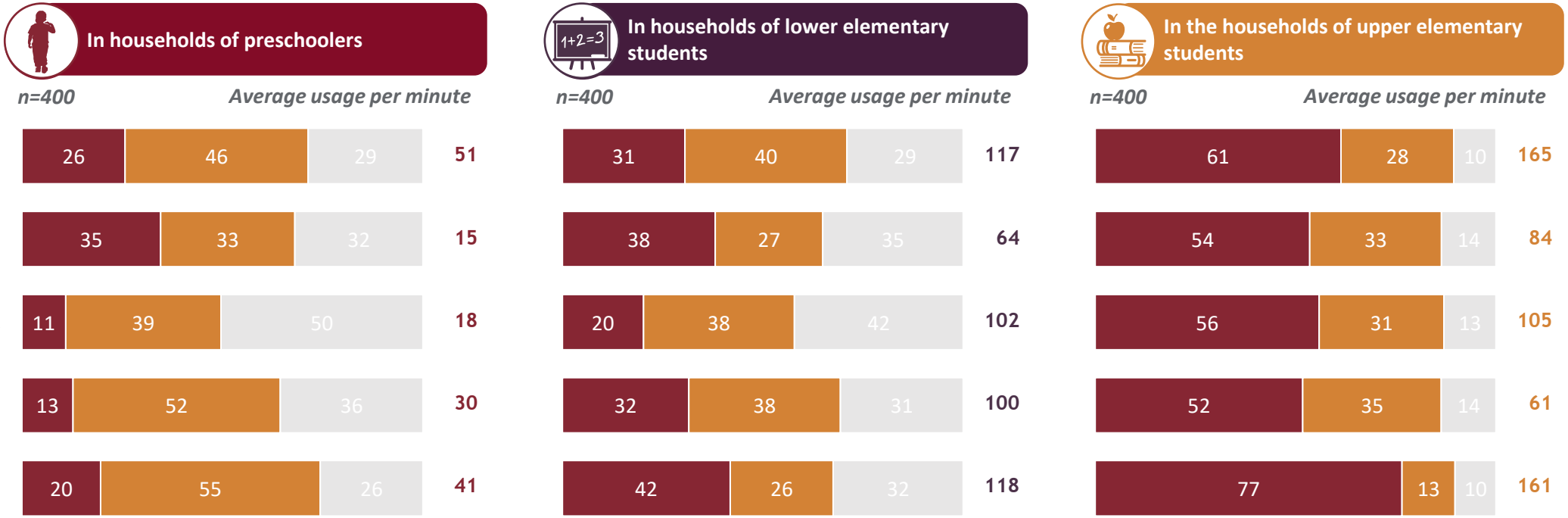


How often does your preschool / lower elementary/ upper elementary child(ren) use the following devices? Base: all respondents in all samples [n=400]
In your opinion, how long can a preschool / lower elementary/ upper elementary child watch / use the following devices? Base: all respondents in all samples [n=400]

PARENTAL SUPERVISION IS WEAKER FOR OLDER CHILDREN

Pre-schoolers can use the TV and the computer without parental supervision more often, than other devices. As they growing up, of course, the mobile phone will be the device that is used more often without parental supervision, what's more, since it will be owned, it will be rare if they have to use it with parental supervision

On the right, the daily time spent using the device in minutes



Often Rarely Never

How often does your preschool / lower elementary/ upper elementary child(ren) use the following devices? Base: all respondents in all samples [n=400]
How often does it happen that your preschool / lower elementary/ upper elementary child(ren) uses the following devices without parental supervision? Base: all respondents in all samples [n=400]
In your opinion, how long can a preschool / lower elementary/ upper elementary child watch / use the following devices? Base: all respondents in all samples [n=400]

MEDIA USAGE OF PRESCHOOL CHILDREN – QUALITATIVE RESEARCH

Computer, tablet, smartphone:

- Although TV-set is the primary platform of media content consumption in this age group, but new generation tools, such as, **primarily tablet, laptop, and with less significance smartphone** also appear in the repertoire. Most of the children knows the concept of tablet or iPad, some of them knows the concept of laptop, but all of them knows the (mobile)phone.
- In case of tablet, laptop/computer, smartphone on the top of media consumption gaming also appears as a function. Although children do not name specific digital names which they play on these equipment's, however they **make a clear distinctions between whether they are gaming or watching cartoons/movies** on these appliances. They do not own a tablet or mobile yet, and mobile is not among the desired equipments yet either.
- **Parents try to control and limit the usage of tablets and mobiles (both regarding the content and the length of the usage. Tablet has double function:** this is the alternative appliance for the children when the „family" TV-set is used/watched by another family member, and, on the other hand, it's a mobile tool, that is preferred by children on excursions, travel, holiday**. The mobile of the parents is a real "on-the-go" equipment for the children:** it's available on short travels together with the parents during the day (moving from A to B location e.g. by car), and parents also offer smartphone for gaming or watching cartoons when they have to wait some time somewhere (just to kill time)**.**

Internet:

- Some of them already heard that word, and some also get the hang of it*: „this is where Mum plays the movie from".* The word „downloading" has not been mentioned, they do not use the internet on their own yet.

Radio:

- The almost discretional place for listening to radio is the family car, and then they listen to the parents' favorite style of music. They can also use mobile for downloading and listening to music in the car, in such cases, sporadically children can also choose songs from the offer available for the family.

CHILDREN'S CHANNELS, CHILDREN'S CONTENT, FAIRY-TALE HEROES

Awareness

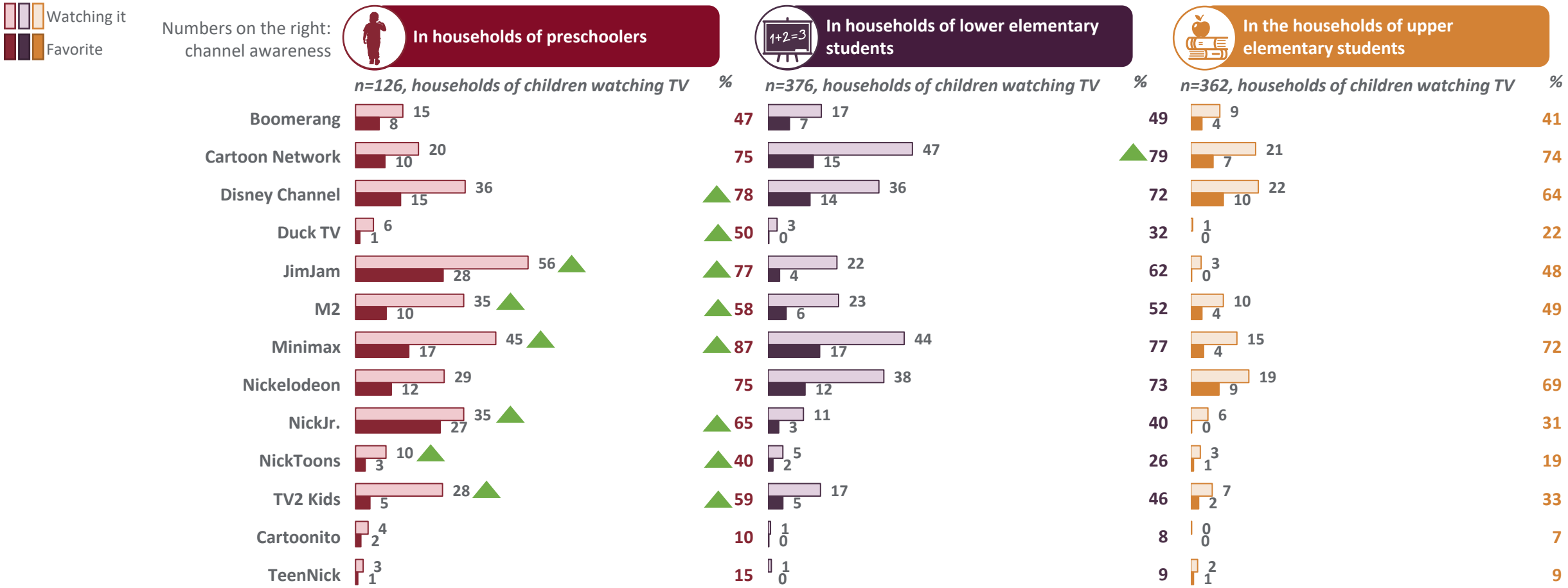
Viewing

Favorite channel

Fairy tale heroes

FAVORITE CHILDREN'S CHANNELS AT DIFFERENT AGES

As children grow, children's channels slowly lose their appeal, upper elementary students watch programs with this content much less often. Minimax, Disney, JimJam, Nickelodeom and CN are the best known among the smallest, preschoolers. The most popular among preschoolers are the same channels, namely JimJam and Minimax, but they are joined by the lesser-known M2 and NickJr.



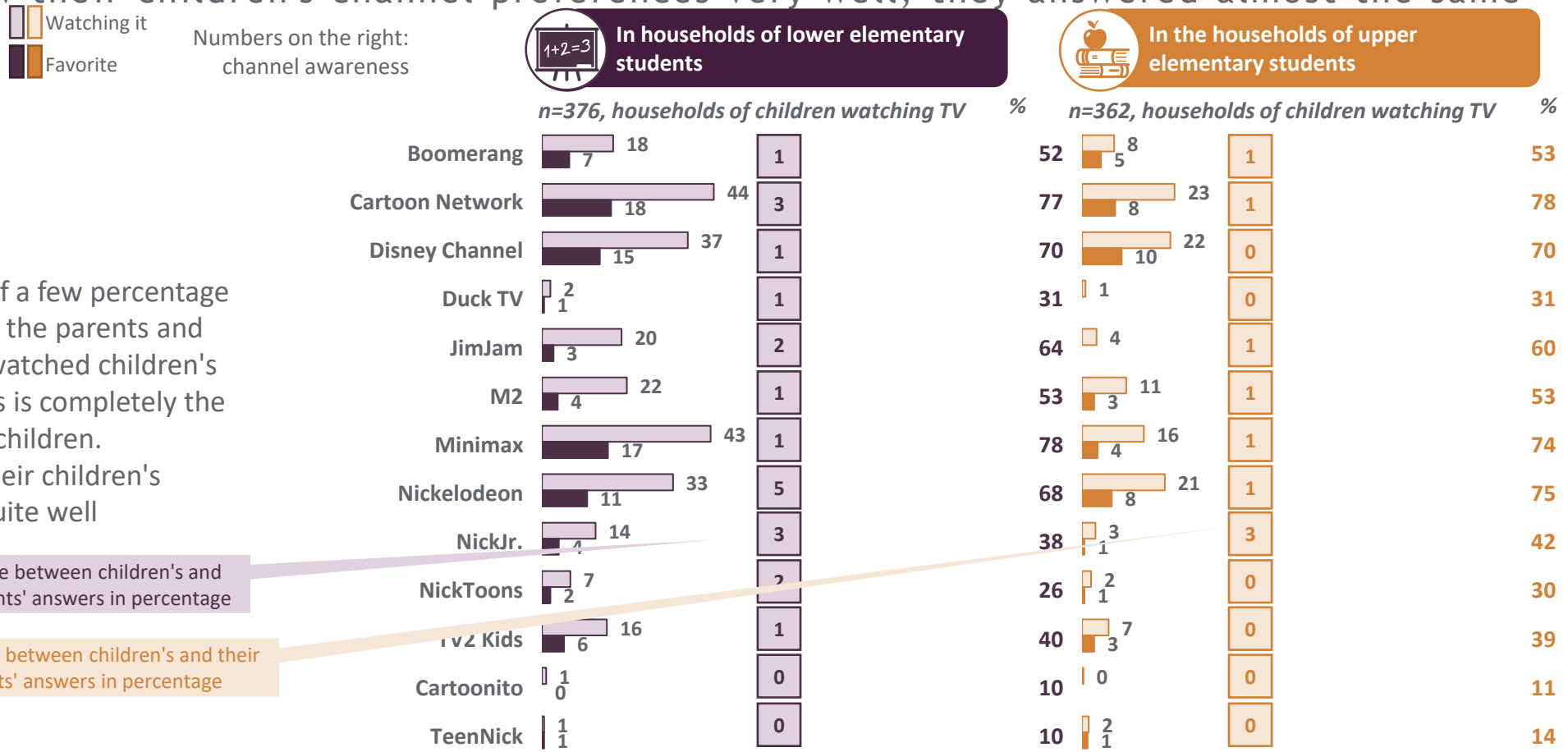
Which of the following children's channels do you know? Multiple answers are possible. Base: all households in which children watch TV, preschoolers n=000, lower elementary students n=376, upper elementary students n=362
Which children's channels does your preschool / lower elementary/ upper elementary child(ren) watch? Base: the same
And which is the favorite children's channel of the preschool / lower elementary/ upper elementary child(ren)? Please choose one. Base: the same

FAVORITE CHILDREN'S CHANNELS - THE VOICE OF CHILDREN

The name and brand awareness of the channels does not wear off with age, since usually the same number of seniors and juniors know each channel, however, according to children, viewership decreases significantly when they reach their teenage years. This question also revealed that parents in both segments know their children's channel preferences very well, they answered almost the same

Based on the children's answers

We hardly found a difference of a few percentage points between the answers of the parents and the children, the order of the watched children's channels named by the parents is completely the same as the order set by their children. Consequently, parents know their children's content viewing preferences quite well

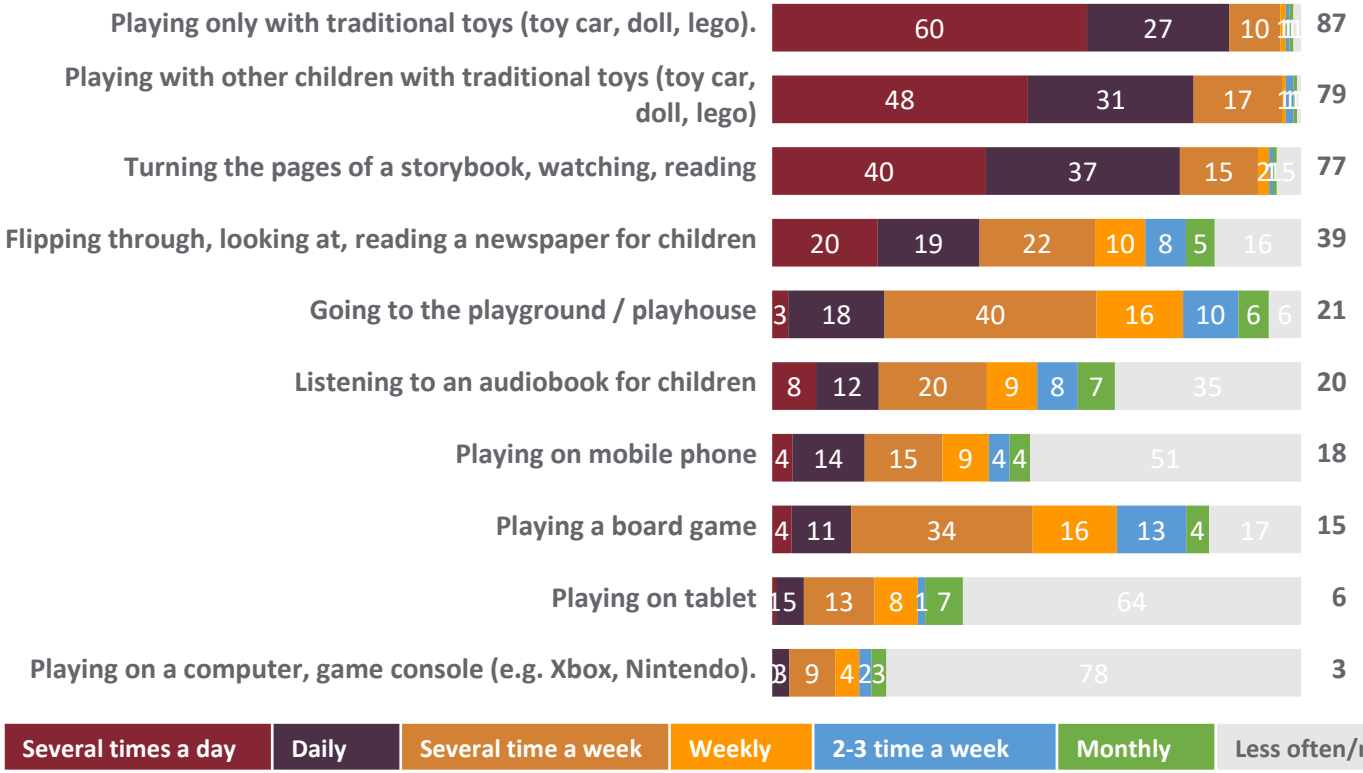


Which of the following children's channels do you know? Multiple answers are possible. Base: all households in which children watch TV, preschoolers n=000, lower elementary students n=376, upper elementary students n=362
Which children's channels do you watch? Multiple answers are possible. Base: all households in which children watch TV, preschoolers n=000, lower elementary students n=376, upper elementary students n=362
And which is your favorite children's channel? Please choose one. Base: all households in which children watch TV, n=000 for preschoolers, n=376 for lower elementary students, n=362 for upper elementary students

PRESCHOOLERS: MAINLY OFFLINE GAMES, ONLINE AND E-GAMES IN THE BACKGROUND

At the top of the list are PAW Patrol, Bing Bunny and Peppa Pig, while Erika Bartos is also at the top with several fairy tales (Bogyó and Babóca, as well as Anna, Peti, Gergő). Preschool children still focus specifically on offline games, online and e-games are in the background. Among their activities, the most common are activities with traditional games and role-playing

Óvodások háztartásaiban



Favorite fairy tales and fairy tale heroes

How often does your preschooler do the following activities? Base: all respondents from parents of preschool children [n=400]ű
What are your preschool child(ren)'s favorite stories? Write a maximum of 3 stories!
What are your preschool child(ren)'s favorite fairy tale characters? Describe a maximum of 3 fairy-tale characters.

CONTENT FOR PRESCHOOLERS – QUALITATIVE RESEARCH

- **The most typical occasion of watching TV is the weekday afternoon,** the **length of time** allowed to watch TV (either based on the number of episodes or the actual time spent on watching TV regulated by the parents) is **usually between 30 and 90 minutes**. Sometimes they watch TV early morning, during breakfast, before they go to the pre-school, or (rarely) during dinner. In the weekends the rules are less strict, then the time spent on witching TV increases, having even more occasions, when the length of these occasions are also regulated by the parents (however continuous, many-hours, non-stop TV watching is not allowed in the weekends either).

- TV set is usually not available in children's room. An exception could be if they share the room with elder brothers or sisters. **They most often watch the "family" TV-set placed in the living room**. This also means that in the time slot which is mostly opened for the children (on weekdays between 5.30-7.30 pm) parents often make a compromise in favour to the children (letting children watch the family TV set in the living room) (see later the role of mobiles and tablets).

- For the children it's not clear (and even indifferent) whether they watch a certain content in a linear way on a TV-channel, or a content that is previously recorded, or a free of charge or a pay-TV streaming content. However, there are some channels which are known by most of them, such as **Minimax or Disney**.

- The most favourite contents are primarily **cartoons or movies made for kids:** Bogyó és Babóca, Mancs őrjárat, Peppa Malac, Disney hercegnők, Aranyhaj, Kutyapajtik, Alvin és a mókusok, Mickey egér, Jégvarázs. Among elder children Bogyó és Babóca is replaced by contents like Aranyhaj, Alvin etc.
  Shrek and Szörny Rt. sporadically also appears among the favourites, which indicates that parents define the borders of the content suitable for the children in different ways.
  Children discuss their impressions about the contents with parents, family members, and these topics sometimes also emerge in the pre-school among the school mates.

CHILDREN'S TV VIEWING AND PARENTS' RELATED PRINCIPLES

How do parents decide what content and what screens are allowed?

Who usually makes the decisions about this?

Matching screen content in preschool children

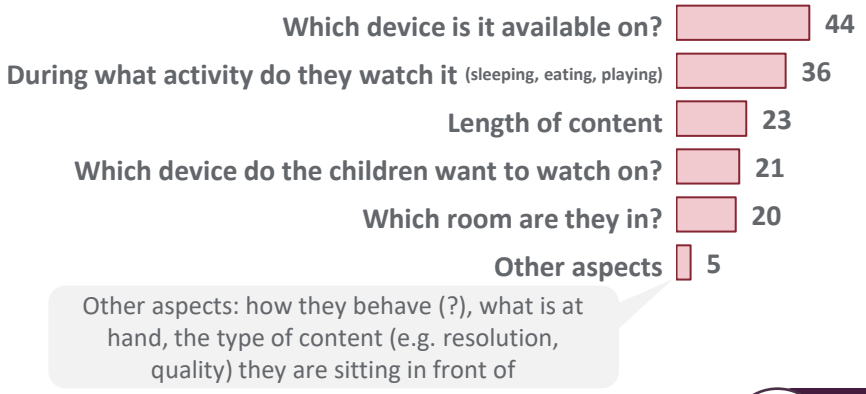
Approved TV content for preschool and elementary school children

THE COURSE OF PARENTAL CONSIDERATION AND DECISION-MAKING AT PRESCHOOL CHILDREN

The length of the content leads to the use of television, for longer content, TV is the most obvious choice. In the vast majority of households, children at this age, in preschool age, still have little say in the choice of content and devices. When choosing content, parents mainly rely on their own knowledge: if they know the content, they will probably approve it, if not, they will "look into it"

On what basis do they decide on the devices?

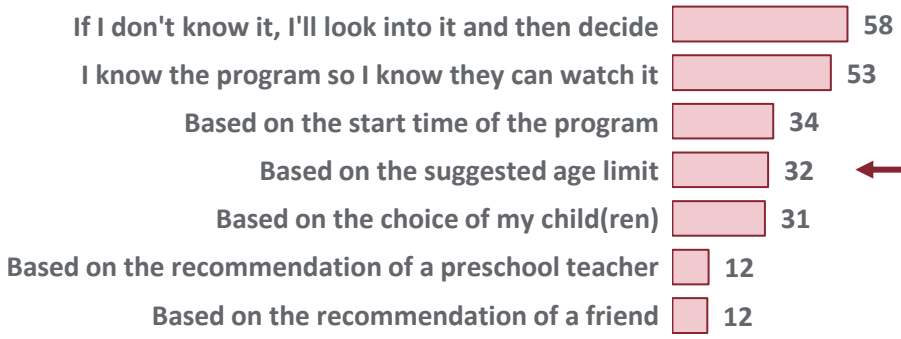
n=400, all respondents



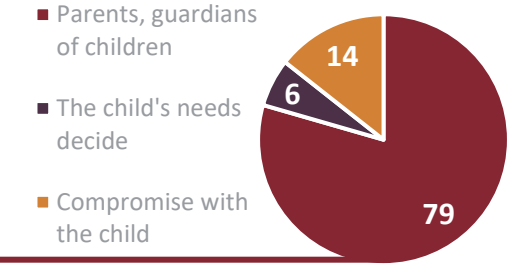
Other aspects: how they behave (?), what is at hand, the type of content (e.g. resolution, quality) they are sitting in front of

On what basis do they decide on the content?

n=126, households of children watching TV

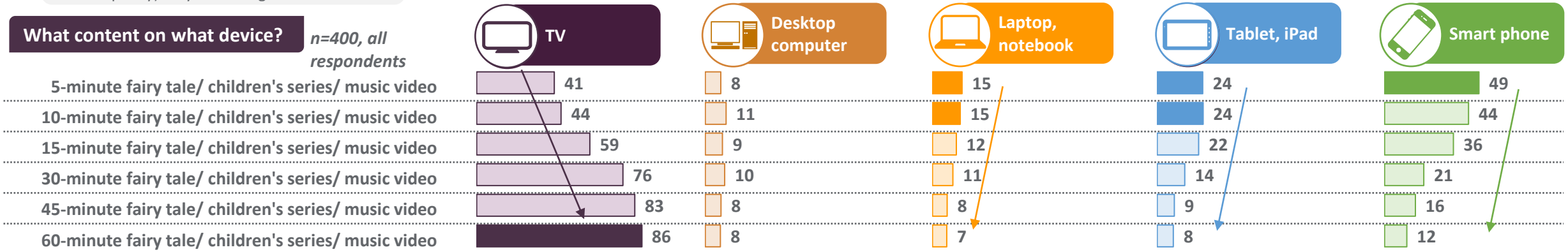


Who decides?



What content on what device?

n=400, all respondents



How do you decide which device(s) your preschool child(ren) watch content on? Base: all respondents from parents of preschool children [n=400]
On what basis do you decide what content your preschool child(ren) can watch?
In the following, we show contents of different lengths. Please indicate which devices they used to watch content of this length (e.g. story, series, short video)? Multiple answers are possible per content.
Who decides what content the preschool child(ren) can watch? Base: all respondents from parents of preschool children [n=400]

MEDIA USAGE OF PRESCHOOL CHILDREN – QUALITATIVE RESEARCH

Generally speaking, in this age group there is no remarkable difference between the characteristics of how younger and elder children of this age group use the different media platforms. Contents consumed by younger and elder children of this age group also has a common set, however regarding the contents there are some differences according to the age of the children and to the preferences of their parents.

TV-watching

- All of them watch TV, they **know the concept of watching TV**.

- **Both the content and the length, as well as the exact timing of watching TV are controlled by the parents.** Approved contents selected by the parents from time to time, and children can select from this set of contents. Children understand that they can only watch the programs, which are approved by their parents (the controller, switching the channels, playing the content are handled by the parents, but most of the children cannot manage these functions yet anyway). Elder children sometimes bring their wishes to watch certain contents from their community (e.g. the pre-school), and they address them to their parents, and then parents may or may not approve this request. Control, selecting the appropriate content, and the potential refusal of certain contents do not generate remarkable conflict between the parents and children, at least from the children's point of view.

- There are **"forbidden" contents** (that are not suitable for children), however it can happen that children accidentally watch into them for a few moments and such contents may raise children's attention. According to the children in such situations their parents immediately alert the children that the specific content is forbidden *("this is not for you", "you cannot watch it").*

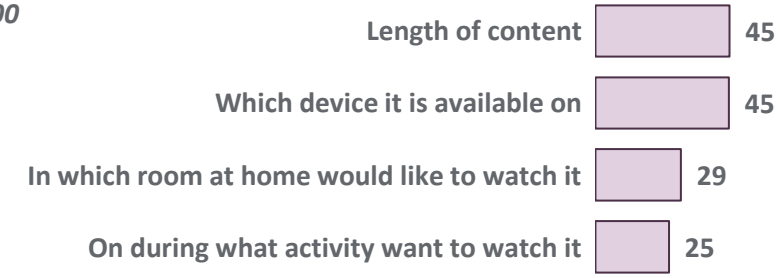
THE LENGTH OF THE CONTENT IS AN IMPORTANT ASPECT: FOR LONGER CONTENT, THE TV

Availability and length of content usually determine the device. As the length of the content increases, the TV becomes more and more dominant due to the audio-visual experience and comfort it provides, while the smartphone mainly runs on the opposite curve, namely it plays a role specifically in the case of short content (5-10 minutes)

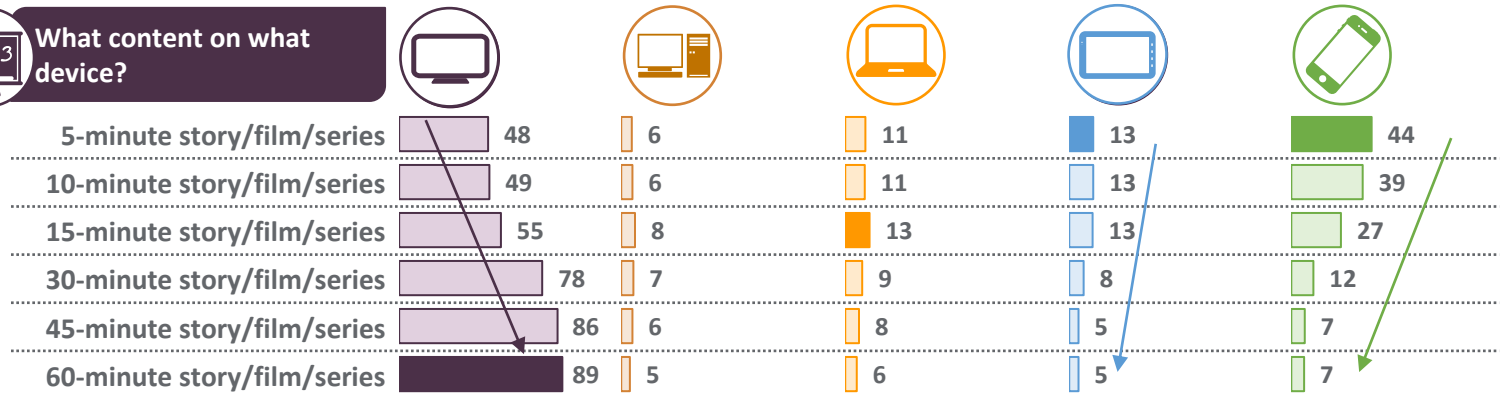
Based on the children's answers

How do you decide on which devices you watch different content? – LOWER ELEMENTARY

n=400

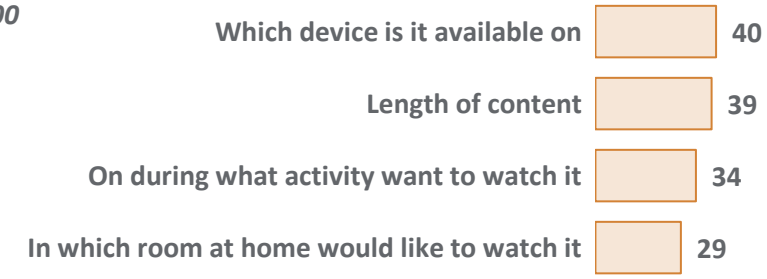


What content on what device?

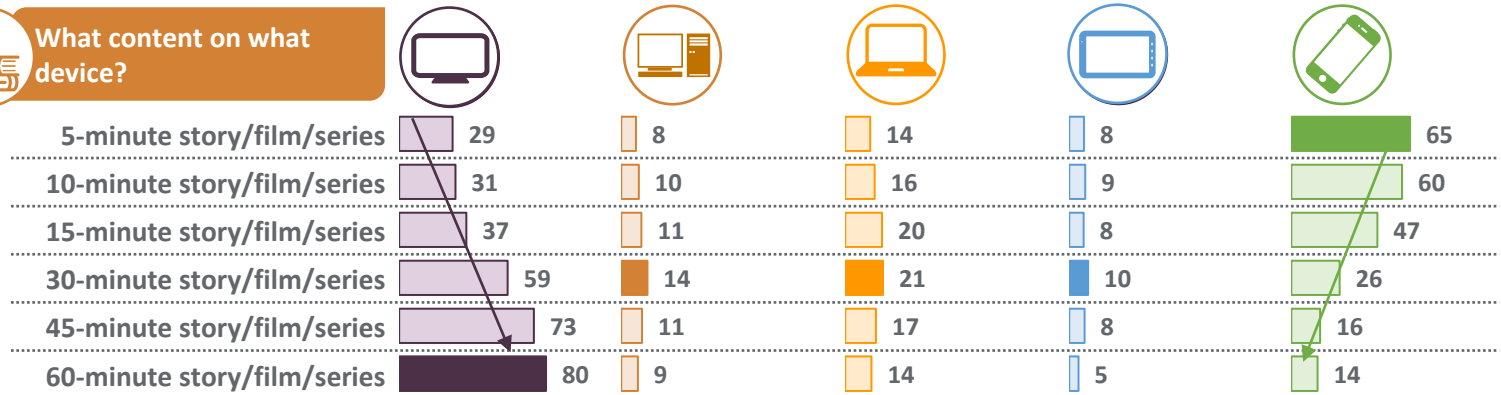


Mi alapján döntöd el, hogy melyik eszközökön nézel különböző tartalmakat? – UPPER ELEMENTARY

n=400



What content on what device?



How do you decide on which devices you watch different content?
In the following, we show contents of different lengths. Please tell us on which devices you like to watch the following content (e.g. fairy tale/series/film/music video).
Multiple answers are possible for each content!
Base: all lower elementary and upper elementary students

AS THE CHILDREN GET OLDER, THEY SLOWLY CAN MAKE DECISIONS

As children grow up, they gain more and more independence, so unilateral parental decision-making is replaced by the child's decision or, even better, compromise. Upper elementary school students make their own decisions more often than their parents. When choosing the content, the screening time of the program is a consideration, especially for parents of lower elementary students, due to the earlier bedtime

In households of lower elementary students

n=400

In households of upper elementary students

n=400

Who decides what content for lower / upper elementary students...?

It is determined by the parent, the person supervising the child (e.g. grandmother).	It is determined by the needs of the child(ren).	We are making a compromise		In households of upper elementary students
61	11	29	Can watch on TV	23 / 31 / 46
56	16	28	Can listen to on the radio	22 / 36 / 43
55	16	29	Can read in printed press	20 / 35 / 45

▲ Significantly higher mentioning

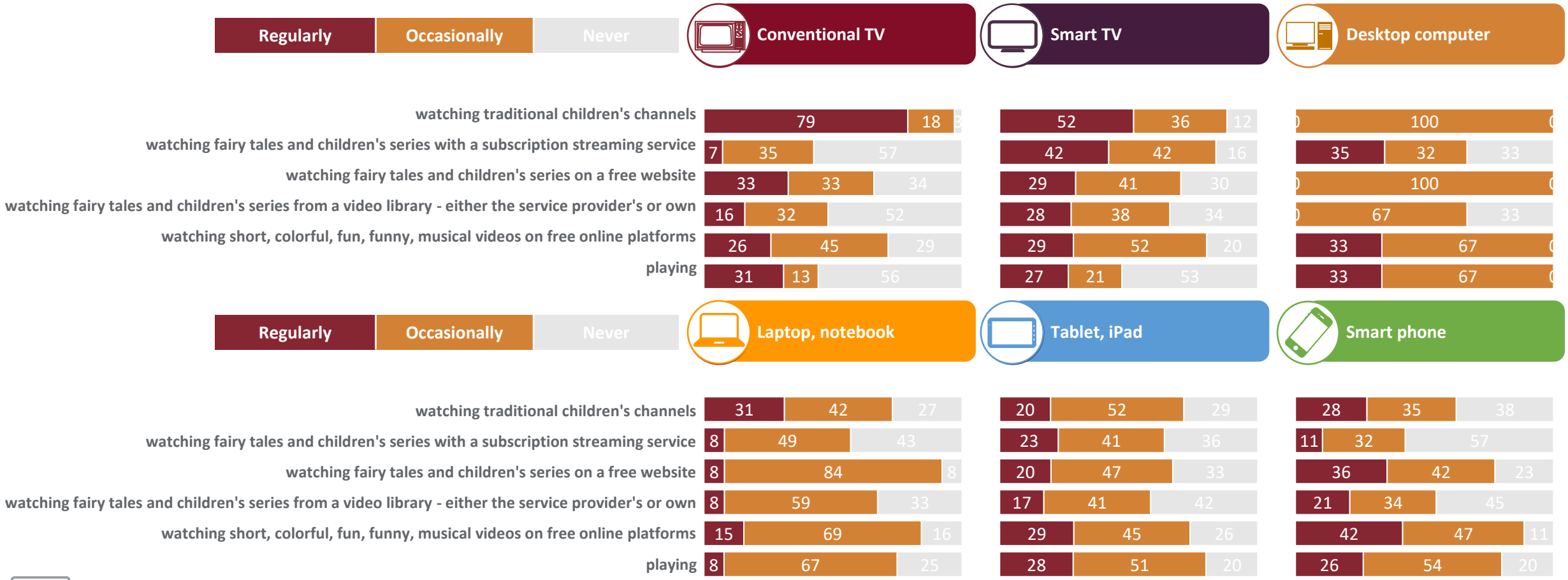
Decision principles

In households of lower elementary students		In households of upper elementary students
52 ▲	Based on the start time of the program	39
51	I know the program so I know they can watch it	48
46	Based on the choice of my child(ren).	52 ▲
44 ▲	Based on the suggested age limit	38
34	If I don't know it, I'll look into it and then decide	36
14	Based on the recommendation of a cteacher	17
12	Based on the recommendation of a friend	13

Who decides what content for lower elementary / upper elementary child(ren)...? Base: all respondents from parents of children in lower and upper elementary school [n=400]
On what basis do you decide what content your lower elementary / upper elementary child(ren) can watch on TV? Base: all respondents from parents of children in lower and upper elementary school [n=400]

CONTENT AND DEVICES ALLOWED FOR PRESCHOOLERS

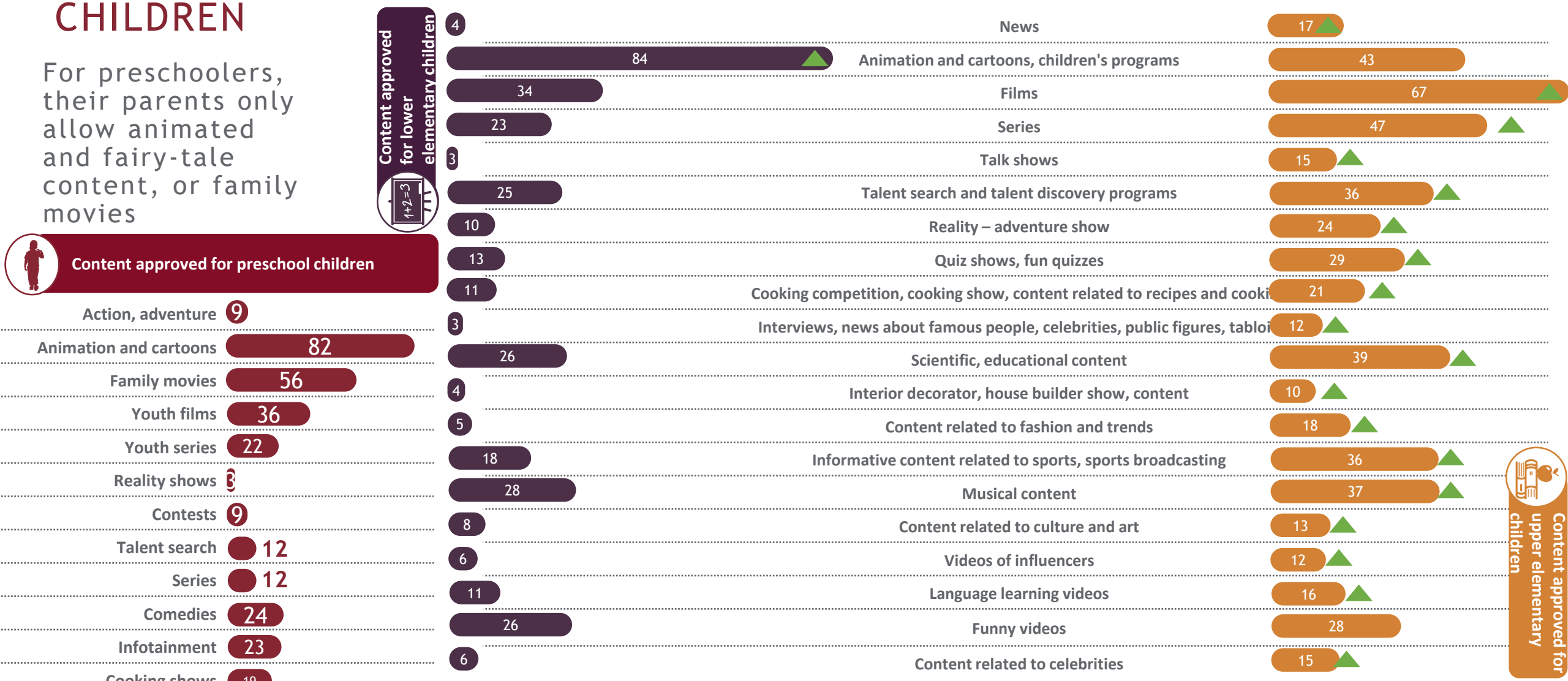
For preschoolers, children's content that is currently being broadcast on traditional story channels, namely linear, is mostly allowed. Due to their nature, they are primarily watched on television. Smart TVs fulfill several roles than traditional TVs: more often, children also watch non-linear content, streaming, children's content from browsers and YouTube. Viewing non-linear content is more related to smart TVs, smartphones and tablets



What kind of content does your preschool child watch on the following devices?
Base: all respondents from parents of preschool children [n=400]

LICENSED TV CONTENT FOR PRESCHOOL AND ELEMENTARY SCHOOL CHILDREN

For preschoolers, their parents only allow animated and fairy-tale content, or family movies

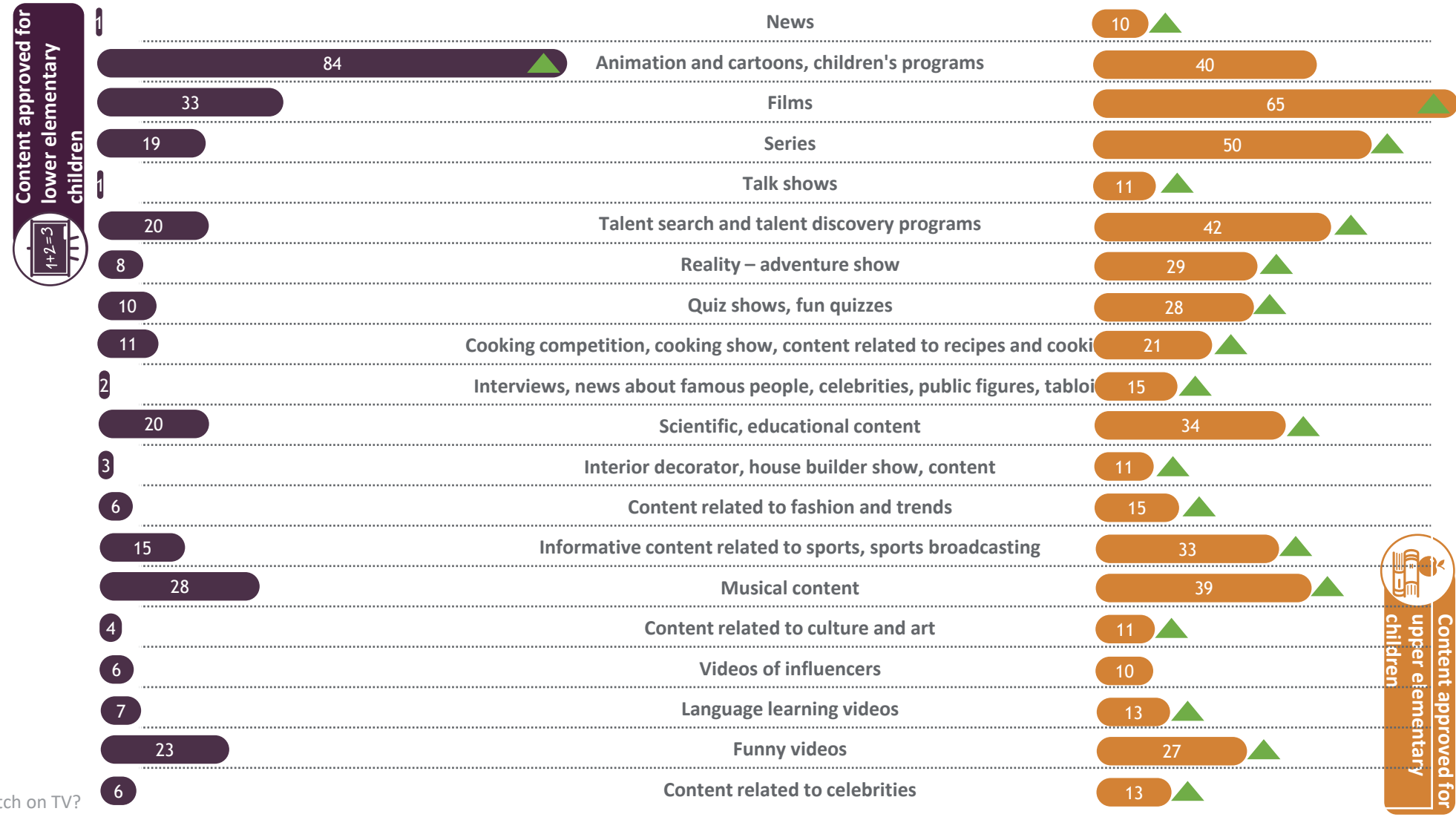


What programs does your preschool-age child(ren) watch together with the family on TV? You can mark several program types. Base: all respondents from parents of preschool children [n=400]
What programs do your lower elementary / upper elementary child(ren) watch on TV? You can mark several program types. Base: all respondents from parents of lower and upper elementary children [m=400]

SCHOOL CHILDREN'S FAVORITE CONTENT - THE VOICE OF THE CHILDREN

Based on the children's answers

Only animated films and children's programs are the content that lower elementary students watch more often, all other content is more popular or watched among upper elementary students and teenagers



What kinds of programs do you like to watch on TV? Multiple answers are possible!
What are your favorite TV shows? Multiple answers are possible!
Base: all lower elementary and upper elementary students who watch TV

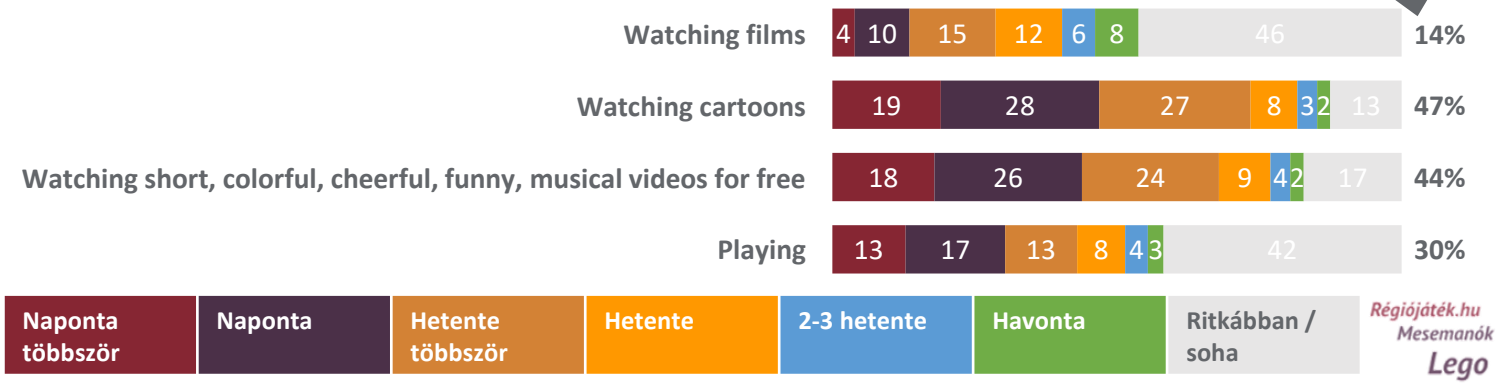
INTERNET USAGE AND PARENTS' RELATED PRINCIPLES

PRESCHOOLERS ON THE INTERNET: HALF AN HOUR ON WEEKDAYS, ONE HOUR ON WEEKENDS

Preschoolers use the Internet primarily to watch cartoons and children's content, for an average of half an hour on weekdays and an average of 1 hour on weekends. It is significantly less used for watching movies or playing online games, which would be very early at this age. In the case of preschoolers, the dominance of YouTube is clear, which they can obviously watch with parental supervision

How often do they do the following Internet activities?

% of children do it on a daily basis



Websites visited by preschoolers and online games allowed for them

Average allowed internet time in minutes

	Minutes
On an average weekday	37
An average weekend day	60

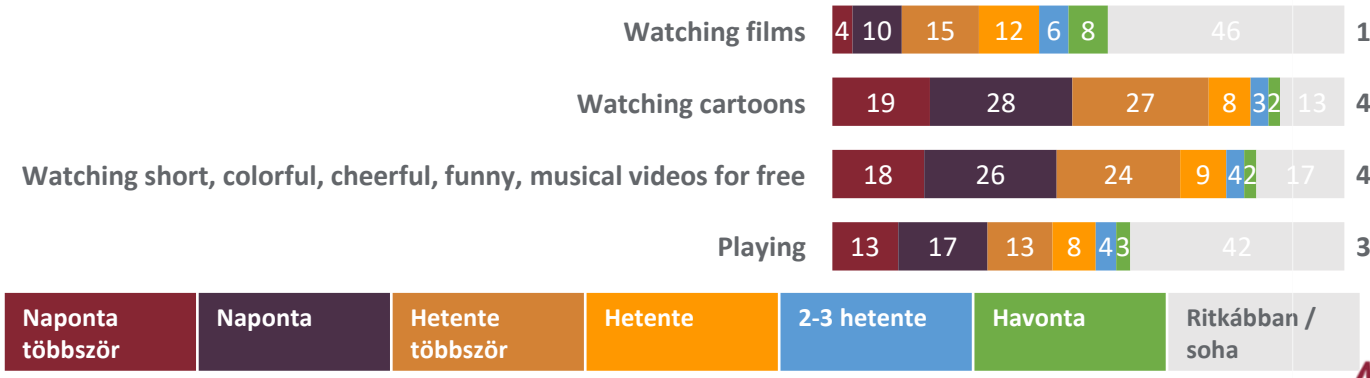
How often does your preschool child(ren) do the following activities on the Internet? Base: all respondents from parents of preschool children [n=400]
What websites do your preschool-age child(ren) look at? Please write the names of the websites. Base: preschoolers who use the Internet [n=400]
What online games does your preschool child play? Please write the name of the online games. Base: preschoolers who play on the Internet [n=400]
On an average weekday, how much Internet time is allowed for preschool-age child(ren)? Base: all respondents from parents of preschool children [n=400]
On an average weekend day, how much Internet time is allowed for preschool-age child(ren)? Base: all respondents from parents of preschool children [n=400]

PRESCHOOLERS: THEY WATCH YOUTUBE, PLAY WITH SKILL BUILDERS

On the previous slide, we saw that among the online sites and media providers, YouTube is "most popular" among preschoolers. In the case of online games, however, the situation is not so clear. They rarely mention a specific online game, but rather refer to the nature of the game: skill builders, coloring and jigsaw puzzles are more popular. Specific games: Minecraft, Talking Tom, Super Mario, Big Farm, Berry and Goofy

How often do they do the following Internet activities?

% of children do it on a daily basis



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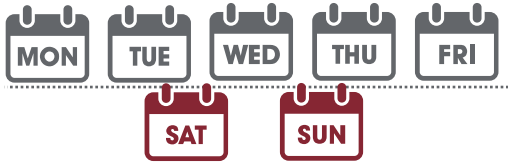
An average weekend day	60



How often does your preschool child(ren) do the following activities on the Internet? Base: all respondents from parents of preschool children [n=400]
What websites do your preschool-age child(ren) look at? Please write the names of the websites. Base: preschoolers who use the Internet [n=400]
What online games does your preschool child play? Please write the name of the online games. Base: preschoolers who play on the Internet [n=400]
On an average weekday, how much Internet time is allowed for preschool-age child(ren)? Base: all respondents from parents of preschool children [n=400]
On an average weekend day, how much Internet time is allowed for preschool-age child(ren)? Base: all respondents from parents of preschool children [n=400]

INTERNET ACTIVITIES OF SCHOOLCHILDREN - THE VOICE OF THE CHILDREN

Lower elementary students mainly watch cartoons on the internet, although some also play online games, but this is not typical. Going towards top of this age category playing online games getting more and more typical. Among upper elementary students internet has major role in education, listening to music and watching movies

Lower elementary students' activities according to their own words

Based on the children's answers

Upper elementary students' activities according to their own words

n= 384, who use the Internet

What do you like to do on the Internet? Multiple answers are possible!

n=384, who use the Internet

Favorite websites:
- Facebook
- YouTube
- Tiktok
- Related to learning, Kréta, Eduline
- Insta
- Wikipedia

Favorite online games:
- Minecraft
- Card games
- Fortnite
- Word finder
- Roblox
- FIFA
- Mahjong

What do you like to do on the Internet? Multiple answers are possible! Base: all lower elementary and upper elementary students who use the Internet
What websites do you read alone? Please list them. Base: all lower elementary and upper elementary students who use the Internet
What online games do you usually play alone? Please list them. Base: all lower elementary and upper elementary students who use the Internet

FAVORITE SITES - CHILDREN OFTEN USE THE INTERNET ONLY UNDER SUPERVISION

Lower elementary children often use the Internet only with parental supervision, and when they do, they mainly watch children's content on YouTube. The older ones already use the Internet independently, without parental control, and often "hang out" on social networking sites. In several studies, teenagers already speak condescendingly of Facebook (the site for the elderly), accordingly, TikTok is catching up to FB

Lower elementary students' activities according to their own words

n= 314, who use the Internet

Based on the children's answers

Upper elementary students' activities according to their own words

n=384, who use the Internet

I don't watch alone (without mom/dad)

What websites do you read alone? Please list them.
Base: all lower elementary and upper elementary students who use the Internet

FAVORITE ONLINE GAMES ARE MINECRAFT AND FORTNITE

Minecraft dominates both target groups, Fortnite also has a strong presence. Dress-up, make-up, and caring video games are popular among younger children, especially girls, but games in which you have to manage a farm are also popular. Card games are also generally popular, and Solitaire stands out among them

Lower elementary students' activities according to their own words

n= 314, who use the Internet

Based on the children's answers

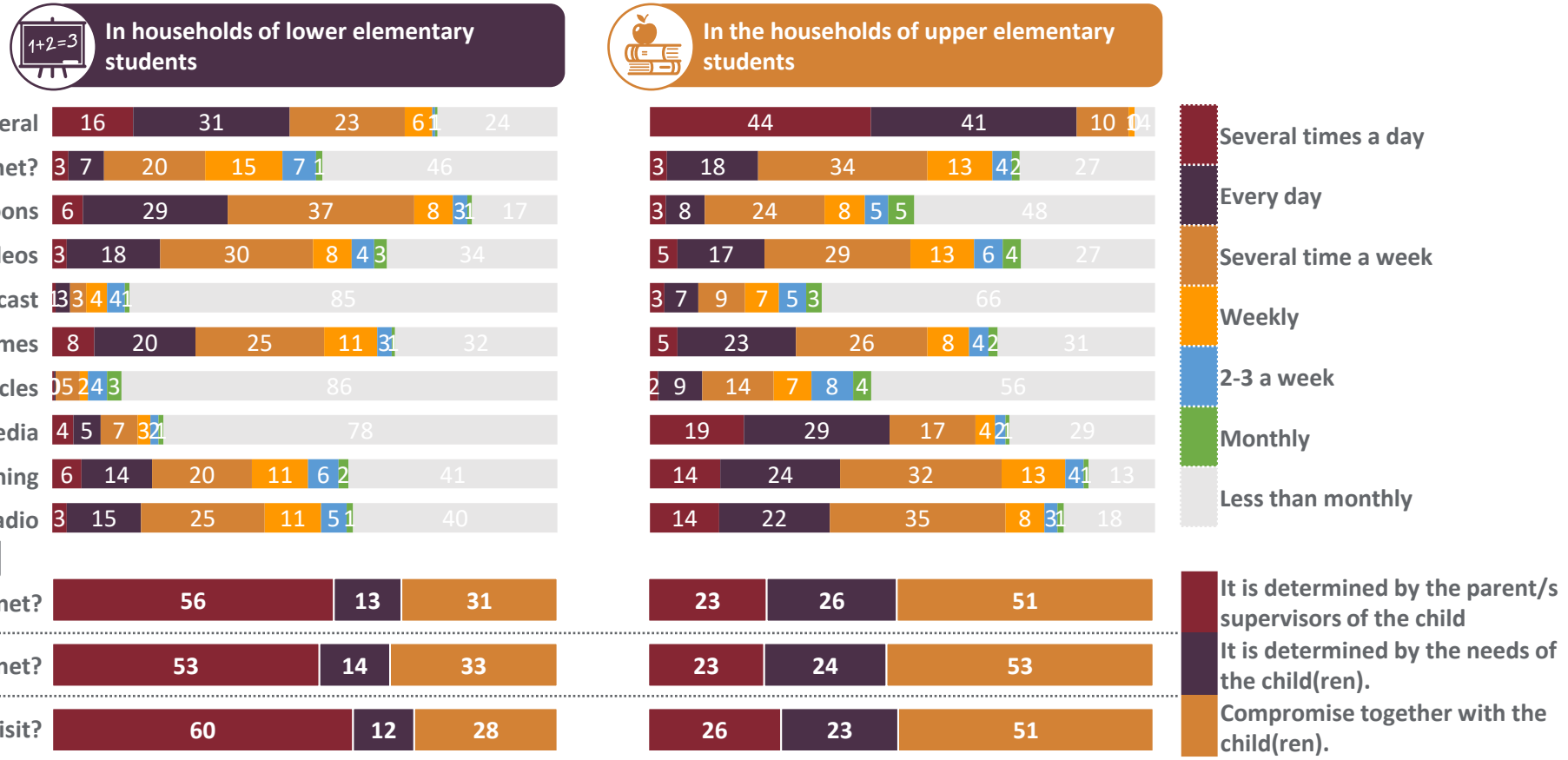
Upper elementary students' activities according to their own words

n=384, who use the Internet

What online games do you usually play alone? Please list them.
Base: all lower elementary and upper elementary students who use the Internet

USING HABITS HABITS OF INTERNET OF LOWER AND UPPER ELEMENTARY SCHOOL CHILDREN

Of course, upper elementary school children use the Internet more often and more intensively, and as they get older, parental control and interference weakens, and parents take a step back. In particular, social media, websites that help learning, music and films and series come to the fore - according to the parents' view, as they see it



How often do your lower / upper elementary child(ren) use the Internet? Base: all respondents from parents of children in lower and upper elementary school [n=400]
How often does your lower / upper elementary child(ren) use the Internet...? Base: all respondents from parents of children in lower and upper elementary school [n=400]
In your household, who determines whether your lower / upper elementary child(ren) ...? Base: all respondents from parents of lower and upper elementary children [n=400]

LOWER ELEMENTARY STUDENTS CAN USE THE INTERNET 1-2 HOURS A DAY, AND UPPER ELEMENTARY STUDENTS 2-2.5 HOURS A DAY

On average, upper elementary students spend 40-50 minutes more on the Internet than younger students. While the smaller ones spend an average of about 1 hour on weekdays and barely 2 hours on the weekend, the older ones can spend an average of almost 2 hours on weekdays and 2.5-3 hours on weekends.

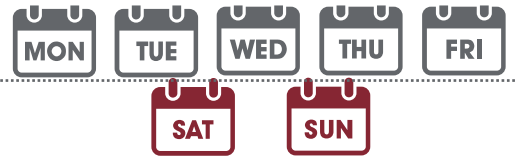
In households of lower elementary students

n=314, Internet-using of lower elementary students

68 min. (=1h 8 min.)

109 min. (=1h 49 min.)

Average allowed internet time in minutes



In the households of upper elementary students

n=388, Internet-using of upper elementary students

109 min. (=1h 49 min.)

163 min. (=2h 43 min.)

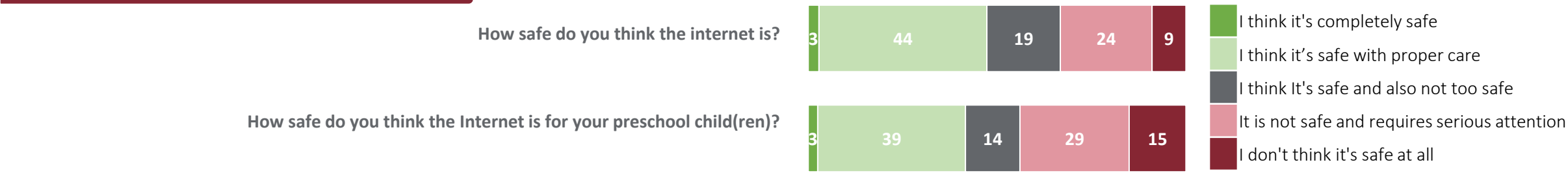
Do you ever use internet bans to discipline your lower / upper elementary child(ren)?

On an average weekday, how much Internet time is allowed for lower / upper elementary school children? Base: parents of Internet-using elementary students [n=314] and Internet-using upper elementary students [n=388]
On an average weekend day, how much internet time is allowed for a child(ren) in lower / upper elementary school? Base: parents of Internet-using elementary students [n=314] and Internet-using upper elementary students [n=388]
Do you ever use internet bans to discipline your lower / upper elementary child(ren)? Base: parents of Internet-using lower elementary students [n=314] and Internet-using upper elementary students [n=388]
Base: all respondents from parents of children in lower and upper elementary school [n=400]

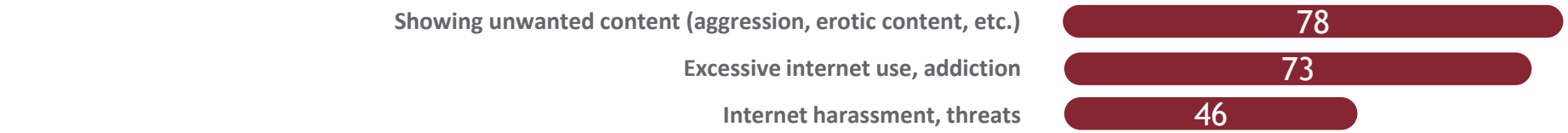
INTERNET SAFETY FOR PRESCHOOLERS

The tension and fear caused by exposure to the Internet is clear among the parents of preschoolers: according to almost half of the parents of preschoolers, the Internet carries dangers for their children, mostly unwanted content, such as aggression, erotic content. Accordingly, one-sided parental decision-making is common, characteristic of four-fifths of families, and compromise is rare

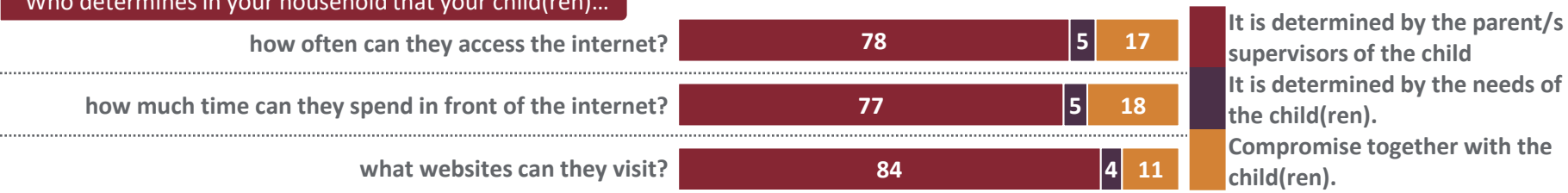
Perception of safety by parents of preschoolers



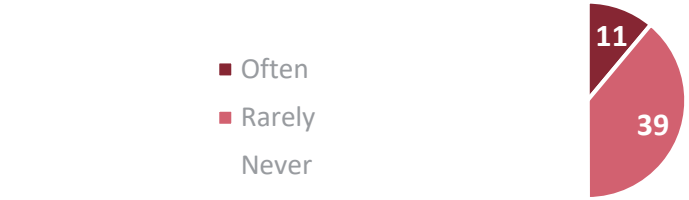
Internet threats dangerous to preschoolers



Who determines in your household that your child(ren)...



Do you ever use internet bans to discipline your preschool child(ren)?



How safe do you think the internet is? Base: all respondents from parents of preschool children [n=400]
How safe do you think the Internet is for your preschool child(ren)? Base: all respondents from parents of preschool children [n=400]
Which of the following Internet threats could pose a danger to your preschool child(ren)? Base: all respondents from parents of preschool children [n=400]
Who determines in your household that your preschool child(ren) [...]? Base: all respondents from parents of preschool children [n=400]
Do you ever use internet bans to discipline your preschool child(ren)? Base: all respondents from parents of preschool children [n=400]

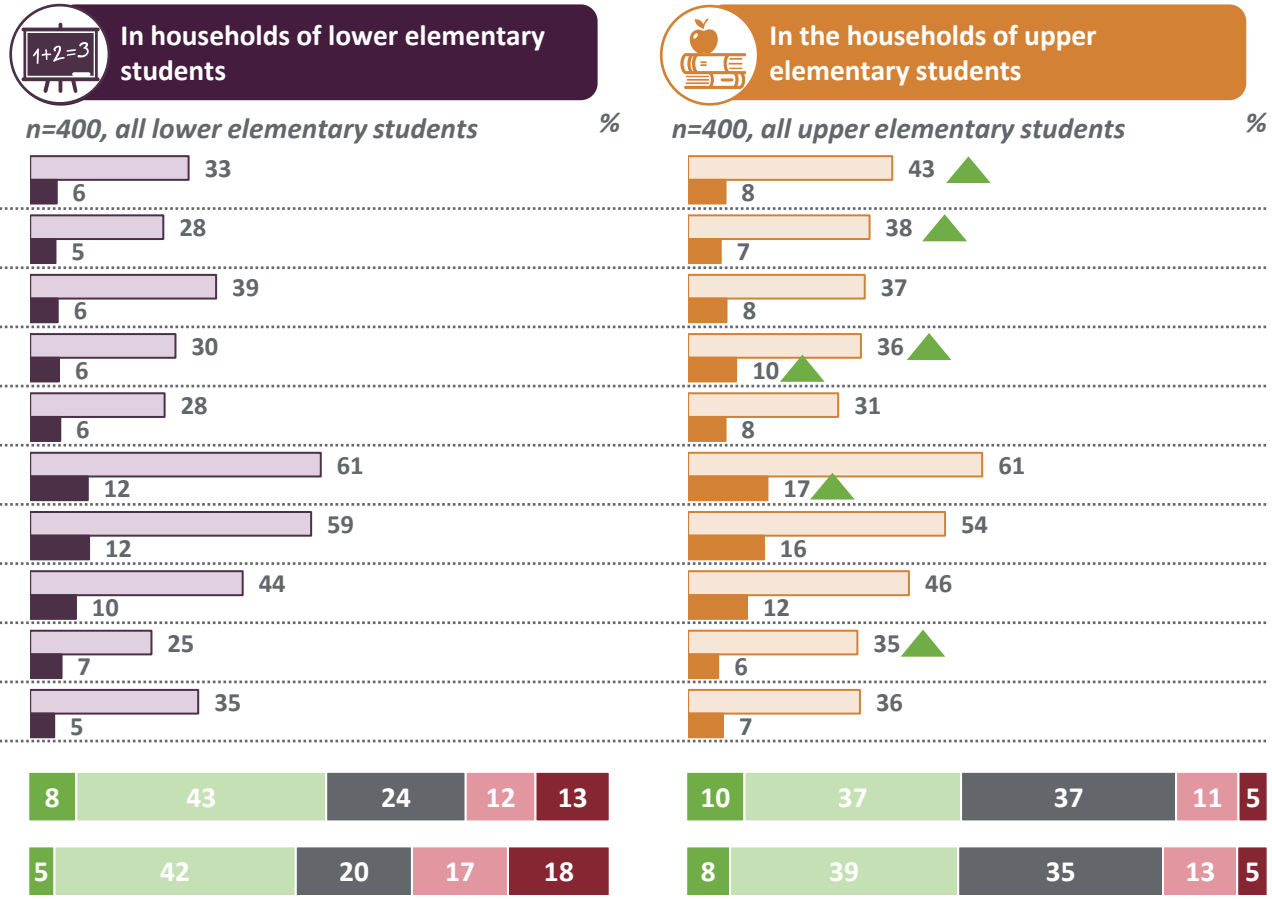
MAIN FEARS: HARASSMENT, EROTIC AND AGGRESSIVE CONTENT, ADDICTION

Parents of upper elementary children are more sensitive and worried about almost all threats. They have significantly more often experienced the negative experience of a hacked user account or internet harassment. Most of all, they are afraid of bullying, aggressive and sexual content for their children, but they are also afraid that their child will develop an Internet addiction.

Significantly higher mentioning

Threats that parents believe could be dangerous

Threats in which their children have already been involved



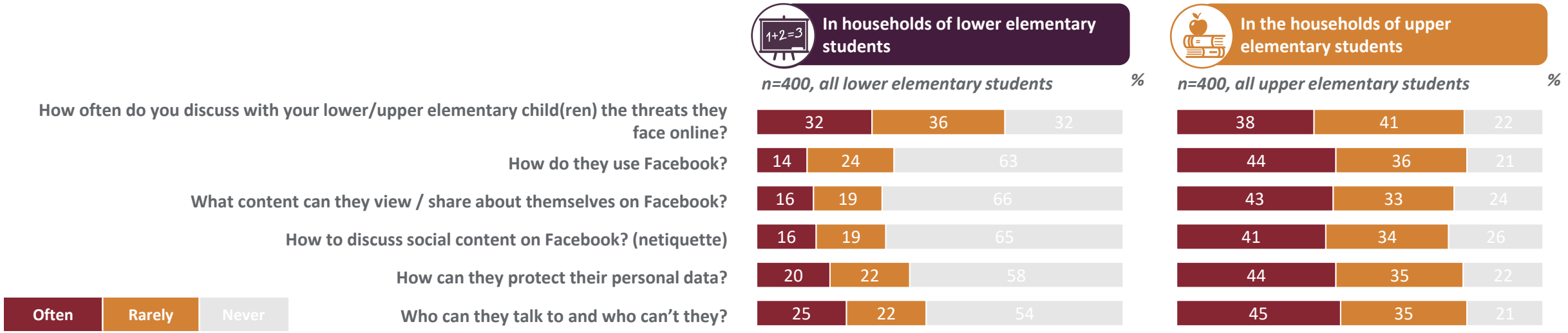
Which of the following Internet threats could pose a danger to your lower / upper elementary child(ren)? Base: all respondents from parents of children in lower and upper elementary students [n=400

]In which of the following Internet threats have your lower/upper elementary child(ren) been involved? Base: all respondents from parents of children in lower and upper school [n=400]

How safe do you think the internet is? How safe do you think the internet is for your child(ren) in lower / upper school? Base: all respondents from parents of children in lower and upper elementary school [n=400]

HOME CONVERSATIONS ABOUT THE DANGERS OF SOCIAL MEDIA

Every ninth lower elementary student and two-thirds of upper elementary students have their own profile on Facebook. Accordingly, Facebook-related precautions and parental guidelines appear more often in the families of upper elementary students, as they may already be personally affected by issues of social media us.



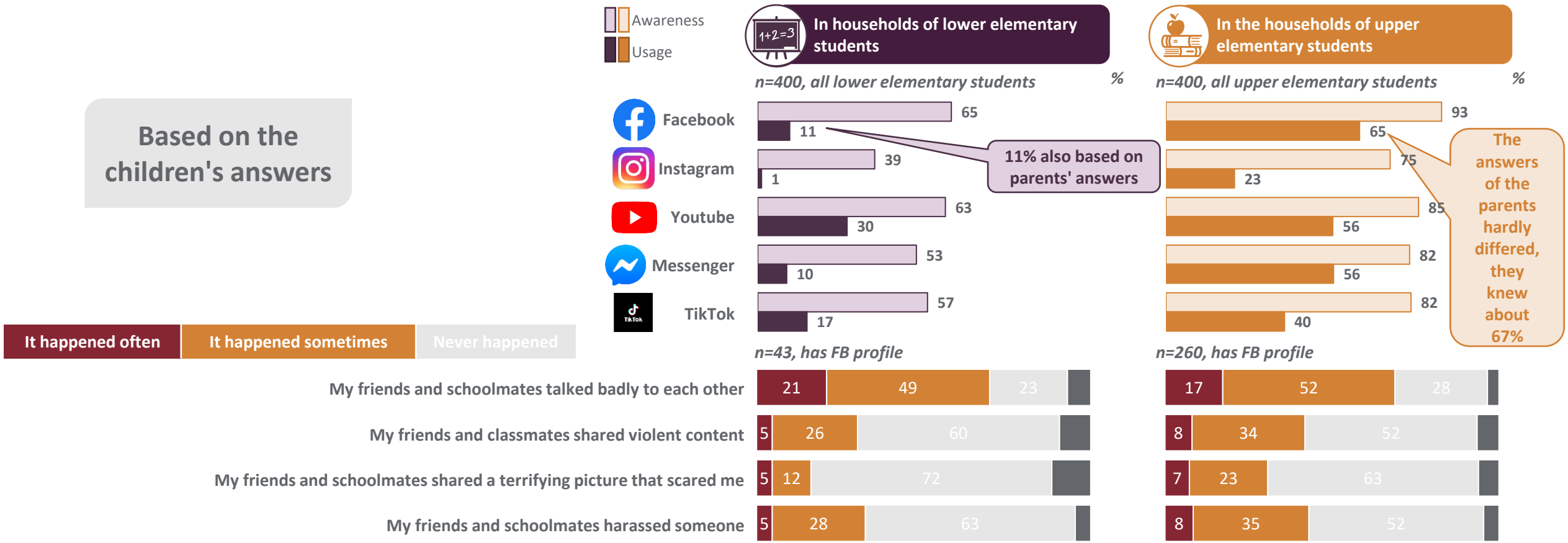
Has a Facebook profile

How often does it happen that you discuss with your lower/upper elementary child(ren) the threats they face on the Internet? Base: all respondents from parents of children in lower and upper elementary school [n=400]
How often do you talk to your lower/upper elementary child(ren) about the following related to social media? Base: all respondents from parents of children in lower and upper elementary school [n=400]
Do your lower/upper elementary child(ren) have their own Facebook profile? Base: all respondents from parents of children in lower and upper elementary school [n=400]

SOCIAL MEDIA - THE VOICE OF CHILDREN - TIKTOK PRECEDES FACEBOOK

We can also pay attention to two interesting things: one hand, contrary to all kinds of beliefs, parents know very well whether, for example, their child uses Facebook or not, since the answers given by children and their parents are almost identical in both target groups. The other interesting thing is the extent to which TikTok has come to Facebook, it is already ahead of the younger ones, so it is believed that their generation will start the TikTok wave

Based on the children's answers



Which social networking sites have you heard of? Multiple answers are possible! Base: all lower elementary students [n=400] and upper elementary students [n=400]And which of these do you use? Please list them. Base: all lower elementary students [n=400] and upper elementary students [n=400]
I am now going to read some of the statements that other lower/upper elementary children have made about Facebooking. Which of these has ever happened when you were on Facebook? And if it has happened, please tell me if it happens often or more often or only sometimes? Base: all upper [n=43] and lower [n=260] elementary students who use Facebook

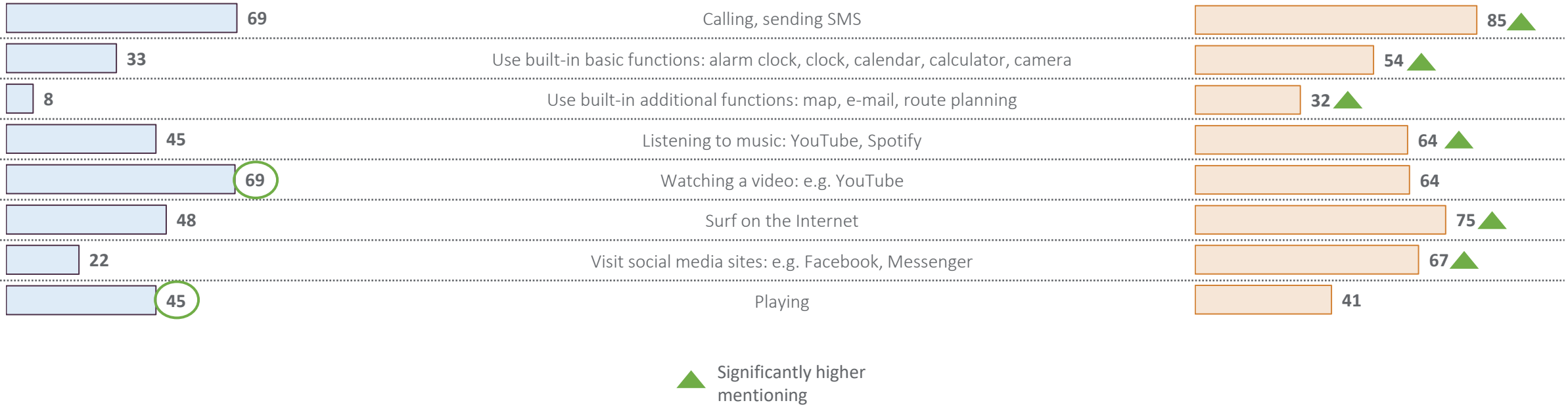
SMARTPHONE ACTIVITIES OF SCHOOLCHILDREN - THE VOICE OF THE CHILDREN

There are only two activities that do not appear more intensively with the children as they get older: playing on smartphones, as the younger ones often do this, and watching YouTube videos, as the younger ones also have big favorites on YouTube (e.g. (Bory and Babóca, Peppa Pig, Bruno, but also children's songs can be mentioned here)

In households of lower elementary students

Based on the children's answers

In the households of upper elementary students



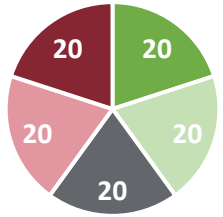
What do you usually do on your smartphone?
Base: all lower [n=160] and upper [n=332] students who have their own smartphone

PARENTS' ATTITUDE

EXPERIENCES OF PARENTS OF PRESCHOOL CHILDREN'S TV VIEWING

The vast majority of parents have a strong control over their child's TV viewing. They mainly fear a decline in physical activity and the outdoor program, but there is also a strong fear of addiction and distortion in personality development. In all age groups, physical activity is "feared" the most

How much do you supervise your preschool child(ren)'s TV viewing?



- Very consciously
- Consciously
- Sometimes yes, sometimes no
- Not really
- Not at all

- 42 It can expand the children's active and passive vocabulary.
- 41 They can gain new knowledge on a specific topic (e.g. science films).
- 38 It helps learning a foreign language.
- 30 It helps to discover new values and broadens their horizons.

Fears with which at least a quarter of parents agree

- 48 Children spend less time outdoors.
- 44 It reduces children's physical activity, they move less.
- 40 It can be addictive, the more time the child spends in front of the TV, the more wants it.
- 36 A child's personality development can be affected by the amount of time spent in front of the TV.
- 33 Children spend less time outdoors. Children cannot judge the difference between reality and a movie. They often indulge themselves.
- 31 Far too little emphasis on personal family relationships, children play less together or read together with their parents.
- 27 Through TV, they may encounter content that has a detrimental effect on their development (violence, aggressiveness, sexuality).
- 27 Through TV, they may encounter content that has a detrimental effect on their development (violence, aggressiveness, sexuality).

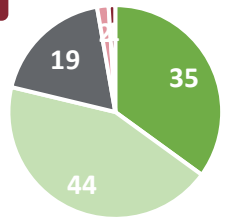
"the self-esteem, conficence decreased"

How much do you supervise your preschool child(ren)'s TV viewing? Base: all respondents from parents of preschool children [n=400]
In your experience, what are the effects of television viewing on preschool children? Please select the ones from the list below that you think can have an impact already in preschool. Base: all respondents from parents of preschool children [n=400]

EXPERIENCES OF PARENTS OF LOWER ELEMENTARY CHILDREN WITH TV VIEWING

As in all target groups, the most serious threat of television viewing is seen in children's sedentary lifestyles, television keeps children away from exercise and going outdoors, according to almost half of the parents. On the other hand, the main advantage is the acquisition and mastering of new knowledge

How much do you supervise your lower elementary child(ren)'s TV viewing?



- Very consciously
- Consciously
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- Not really
- Not at all

- 36 They can gain new knowledge on a specific topic (e.g. science films).
- 35 In connection with the acquisition of knowledge, they can discover new values and can expand their horizons.
- 28 You can expand the children's active and passive vocabulary.
- 26 It can help learning a foreign language.

Fears with which more than a quarter of parents agree

- 44 It reduces children's physical activity, they move less.
- 44 Children spend less time outdoors.
- 36 It can be addictive, the more time the child spends in front of the TV, the more wants it.
- 33 Far too little emphasis on friendship, they meet and play less with other children of their age.
- 33 Children cannot judge the difference between reality and a movie. They often indulge themselves.
- 32 Far too little emphasis on personal family relationships, children play less together or read together with their parents.
- 30 A child's personality development can be affected by the amount of time spent in front of the TV.

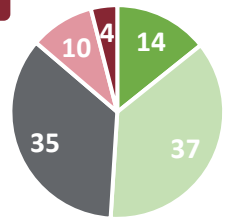
"We don't allow watching TV for now"
"We prefer playing, socializing, not watching TV"
"They still have time, school and reading are enough"

How much do you supervise your lower elementary school child(ren)'s TV viewing? Base: all respondents from parents of lower elementary children [n=400]
In your experience, what are the effects of watching TV on lower elementary children? Please select from the list below the ones that you think can have an impact already in lower school. Base: all respondents from parents of lower elementary children [n=400]

EXPERIENCES OF PARENTS OF UPPER ELEMENTARY CHILDREN WITH TV VIEWING

The main fears are primarily related to the deterioration of the children's physical condition and the deterioration of their personal relationship system, more precisely to the fact that these relationships and joint activities do not develop due to TV viewing, which takes away space from friends and family

How much do you supervise your lower elementary child(ren)'s TV viewing?



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- Consciously
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- Not really
- Not at all

They can gain new knowledge on a specific topic (e.g. science films). — 33

In connection with the acquisition of knowledge, can discover new values and can expand their horizons. — 29

It helps learning a foreign language. — 28

It can expand the children's active and passive vocabulary. — 27

Fears with which more than a quarter of parents agree

"I think we allow so little TV watching that we don't experience any special effects"

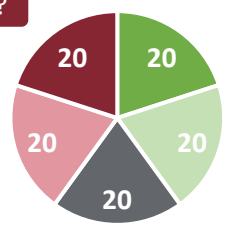
- 40 — Children spend less time outdoors.
- 39 — It reduces children's physical activity, they move less.
- 33 — Far too little emphasis on personal family relationships, children play less together or read together with their parents.
- 32 — Far too little emphasis on friendship, they meet and play less with other children of their age.
- 31 — Children cannot judge the difference between reality and a movie. They often indulge themselves.
- 30 — It can be addictive, the more time the child spends in front of the TV, the more wants it.
- 27 — The advertisements they see on TV encourage them to consume at an early age.

How much do you supervise your upper elementary school child(ren)'s TV viewing? Base: all respondents from parents of upper elementary children [n=400]
In your experience, what are the effects of watching TV on upper elementary children? Please select from the list below the ones that you think can have an impact already in lower school. Base: all respondents from parents of upper elementary children [n=400]

EXPERIENCES OF PARENTS OF PRESCHOOL CHILDREN - DIGITAL TOOLS

The best equipped with devices are the members of the cluster that expects ad-free entertainment and otherwise lives in better living conditions, in which the proportion of IPTV subscriptions is also high

How much do you supervise your preschool child(ren)'s use of digital devices?



- Very consciously
- Consciously
- Sometimes yes, sometimes no
- Not really
- Not at all

- 50 It can expand the children's active and passive vocabulary.
- 50 They can gain new knowledge on a specific topic (e.g. science films).
- 50 It helps learning a foreign language.
- 50 They can discover new values and broadens their horizons.
- 50 It improves children's acquisition of digital skills.

Fears with which more than a quarter of parents agree

"Becoming impatient"

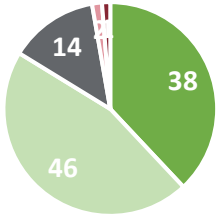
- 50 It reduces children's physical activity, they move less.
- 50 Far too little emphasis on personal family relationships, children play less together or read together with their parents.
- 50 Far too little emphasis on friendship, they meet and play less with other children of their age.
- 50 Children spend less time outdoors.
- 50 Too much time spent in front of the TV can lead to obesity.
- 50 Too much time spent in front of the TV can lead to vision problems.
- 50 A child's personality development can be affected by the amount of time spent in front of the TV.

How much do you supervise your preschool child(ren)'s use of digital devices? Base: all respondents from parents of preschool children [n=400]
According to your experience, what are the effects of preschool children's use of digital devices? Please select the ones from the list below that you think may affect children already in preschool. Base: all respondents from parents of preschool children [n=400]

EXPERIENCES OF PARENTS OF LOWER ELEMENTARY CHILDREN - DIGITAL TOOLS

While the parents of the upper elementary students attach more importance to its role in maintaining relationships, the parents of the lower elementary students feel that it is less important, due to the age of the children. Main risks: little exercise, little outdoor time, addiction, thinning of personal friendships and family relationships

How much do you supervise your lower elementary child(ren)'s use of digital devices?



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It can be a useful help in learning if they can look up the course material on the Internet. — 35

They can gain new knowledge on a specific topic (e.g. science films). — 35

It helps learning a foreign language. — 34

It improves children's acquisition of digital skills. — 33

They can keep in touch with their distant relatives and friends. — 31

They can discover new values and broadens their horizons. — 31

It can expand the children's active and passive vocabulary. — 30

Fears with which more than a quarter of parents agree

„ We try to encourage reading - printed books"

38 — It reduces children's physical activity, they move less.

37 — Children spend less time outdoors.

37 — It can be addictive, the more time the child spends in front of the screen, the more wants it.

34 — Far too little emphasis on friendship, they meet and play less with other children of their age.

29 — Far too little emphasis on personal family relationships, children play less together or read together with their parents.

29 — They can come across fake news, manipulated images and videos on the Internet.

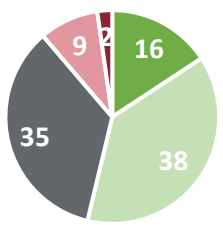
29 — Through the Internet, they may come across content that has a detrimental effect on their development (violence, aggressiveness, sexuality).

How much do you supervise your lower elementary child(ren)'s use of digital devices? Base: all respondents from parents of lower elementary children [n=400]
According to your experience, what are the effects of the use of digital devices by lower elementary children? Please select from the list below the ones that you think can affect children already in lower elementary school. Base: all respondents from parents of lower elementary children [n=400]

EXPERIENCES OF PARENTS OF UPPER ELEMENTARY CHILDREN - DIGITAL TOOLS

Parents agree to the same extent with the advantages we have listed, perhaps three main advantages can be highlighted: help in learning, the possibility of maintaining contact and learning a foreign language. As a disadvantage - similar to TV viewing - children's physical condition is the greatest danger

How much do you supervise your upper elementary child(ren)'s use of digital devices?



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33 — Far too little emphasis on friendship, they meet and play less with other children of their age.

30 — Far too little emphasis on personal family relationships, children play less together or read together with their parents.

29 — They can come across fake news, manipulated images and videos on the Internet.

27 — Too much time spent in front of the TV can lead to vision problems.

How much do you supervise your upper elementary child(ren)'s use of digital devices? Base: all respondents from parents of upper elementary children [n=400]
According to your experience, what are the effects of the use of digital devices by upper elementary children? Please select from the list below the ones that you think can affect children already in upper elementary school. Base: all respondents from parents of upper elementary children [n=400]

EXPERIENCES OF PARENTS OF SCHOOL CHILDREN - SOCIAL MEDIA

Parental control over the use of social media decreases with age. Contacting distant relatives already plays a greater role in the use of social media among upper elementary students

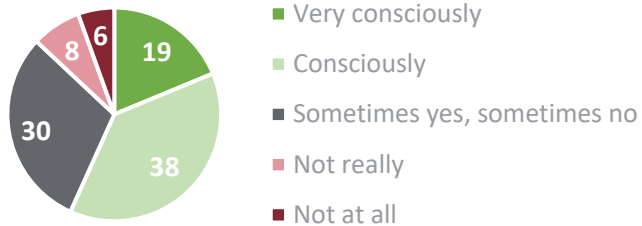
In households of lower elementary students

n=400

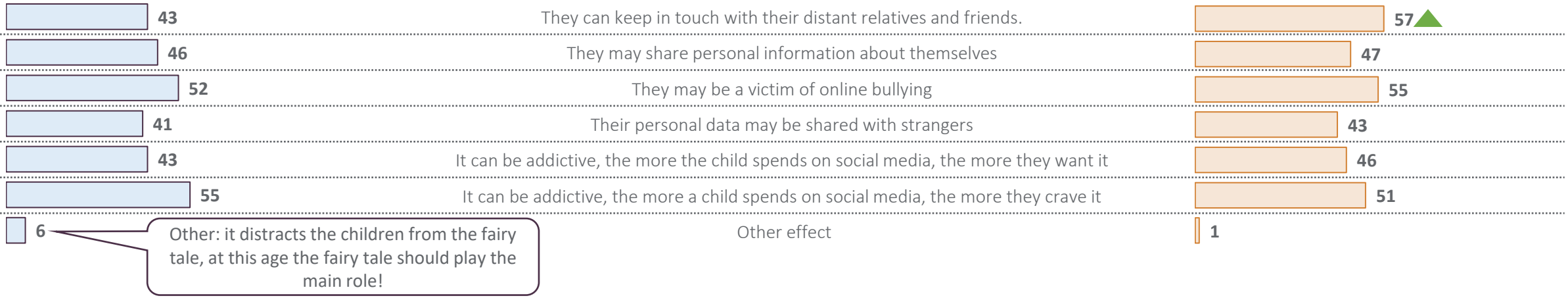
To what extent do you supervise your lower / upper elementary child(ren)'s social media usage?

In households of upper elementary students

n=400



Effects of social media on children according to parents

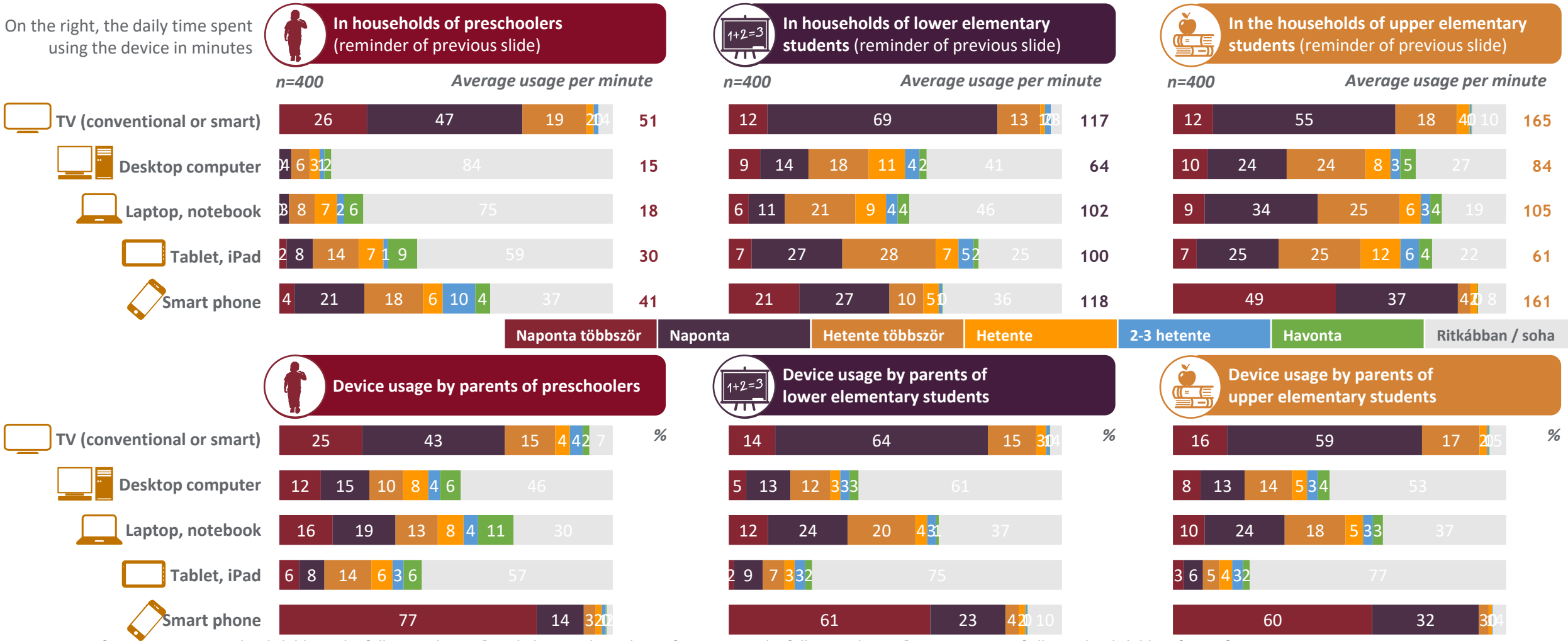


To what extent do you supervise your lower / upper elementary child(ren)'s social media use? Base: all respondents from parents of children in lower and upper elementary school [n=400]
According to your experience, what are the effects of the use of social media by lower / upper elementary children? Please select from the list below the ones that you think can affect children already in lower elementary school. Base: all respondents from parents of children in lower and upper elementary school [n=400]

DEVICE USAGE BY CHILDREN (FROM PREVIOUS SLIDE) AND THEIR PARENTS

Children use desktop computers and tablets more intensively than their parents

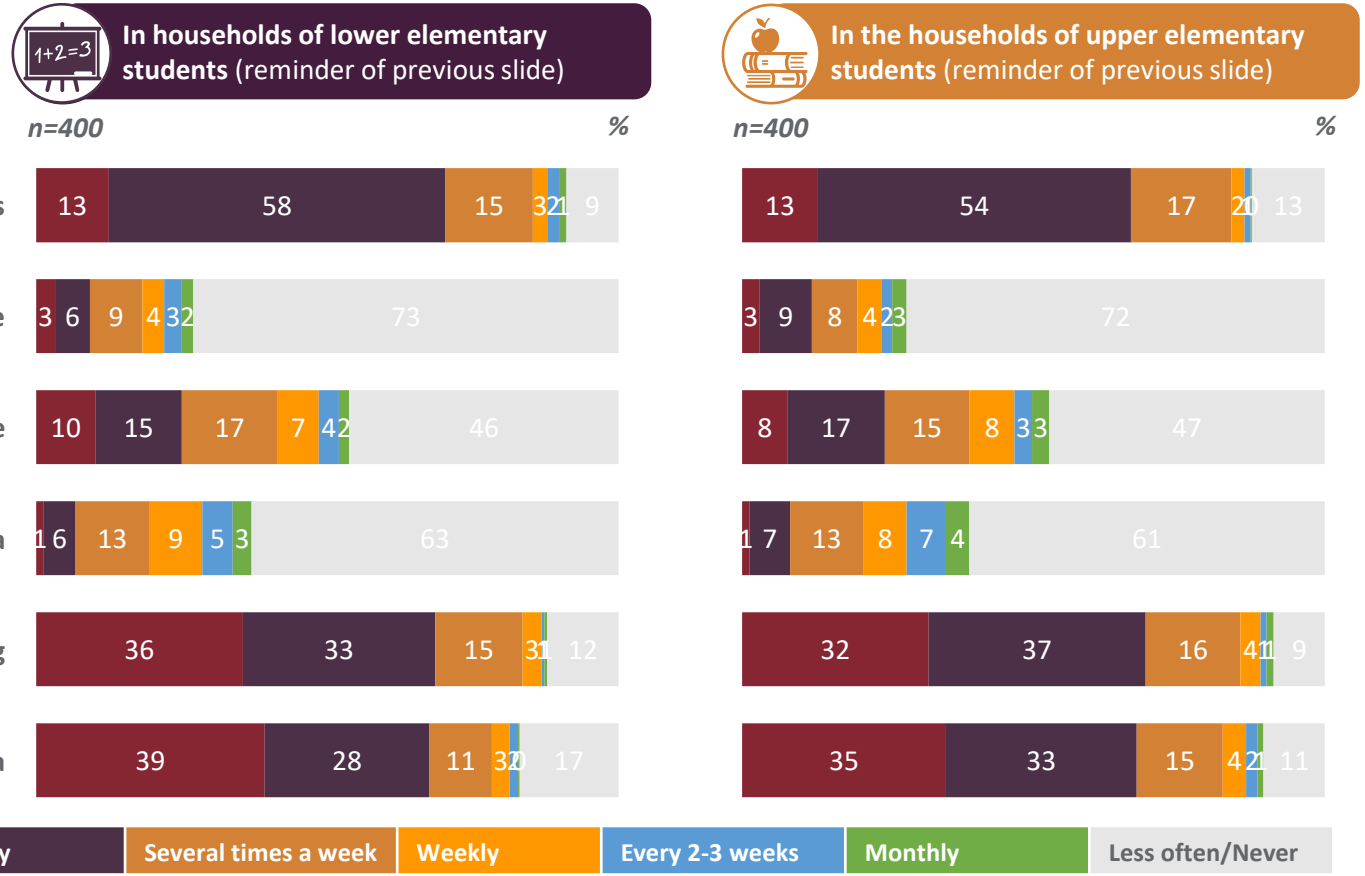
On the right, the daily time spent using the device in minutes



How often does your preschool child use the following devices? And please indicate how often you use the following devices? Base: parents of all preschool children [n=400]
How often does your lower elementary child use the following devices? And please indicate how often you use the following devices? Base: parents of all lower elementary children [n=400]
How often does your upper elementary child use the following devices? And please indicate how often you use the following devices? Base: parents of upper elementary children [n=400]
Please indicate how often you use the devices below. Base: all parents in all samples, target groups [n=400/400/400]

MEDIA USAGE HABITS AND INTENSITY OF PARENTS

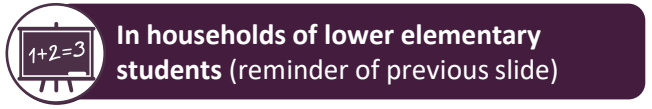
Internet browsing and social media usage are the most intensive in all parent target groups, and every third parent performs these two "media activities" several times a day, on a recurring basis. A significant majority of parents, two-thirds, watch linear or non-linear content on a daily basis, although the figure below also shows that the main driver of this is following linear content. Reading of the printed media is on the decline, two-thirds of them practically do not read printed media at all

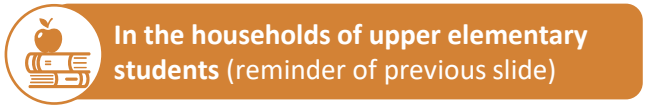


How often do you do the following activities?
Base: all parents in all samples, target groups [n=400/400/400]

PARENTING PRACTICE

The answers of the parents try to reflect the image of a "good parent", namely that they are looking for opportunities to spend time with their children outside of the online space, to spend time together intensively. Almost half of the parents admit that during the time they spend with their children, the mobile phone is in their hands and they do not fully pay attention to the child





How much do you agree with the following statements?
Base: all respondents in all samples [n=400]

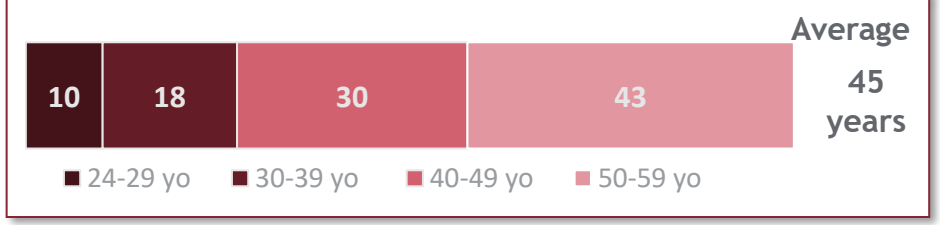
Totally agree | Rather agree | I agree and I do not | Rather disagree | Totally disagree

PRESCHOOL TEACHERS' OPINION

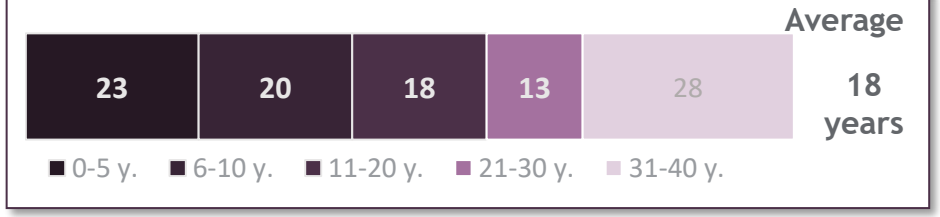
RESEARCH SAMPLE

Age, professional experience and working conditions.

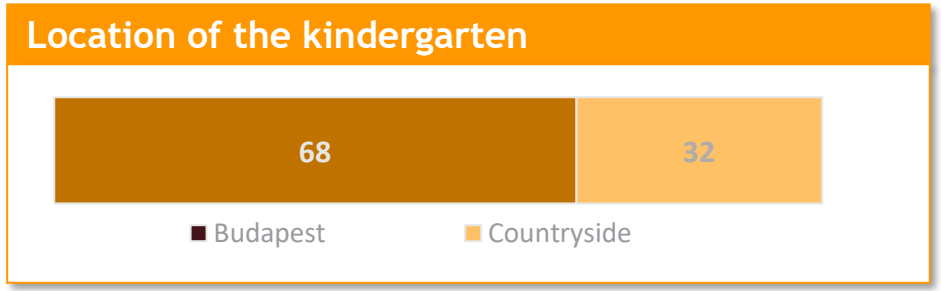
Age of preschool teachers



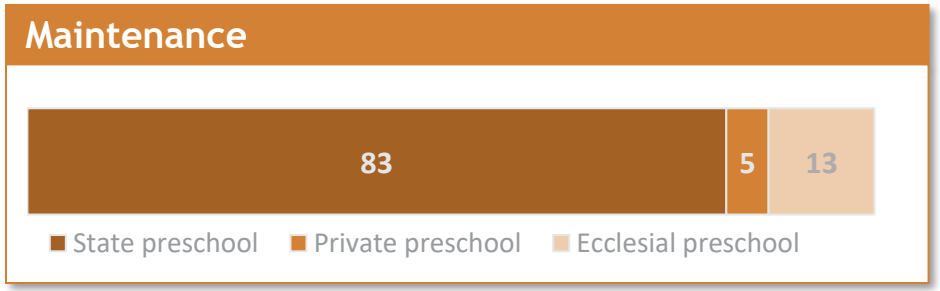
Professional experience of preschool teachers



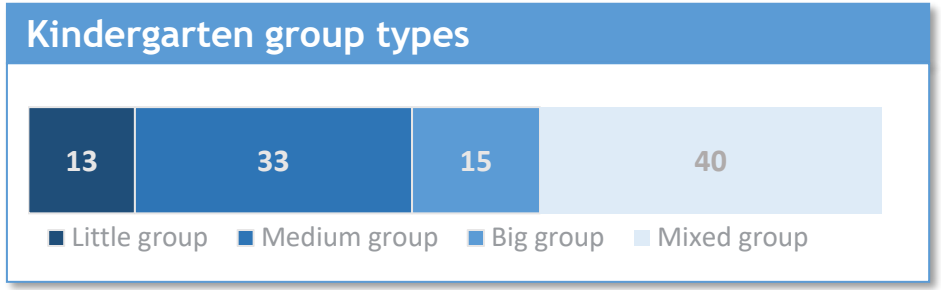
Location of the kindergarten



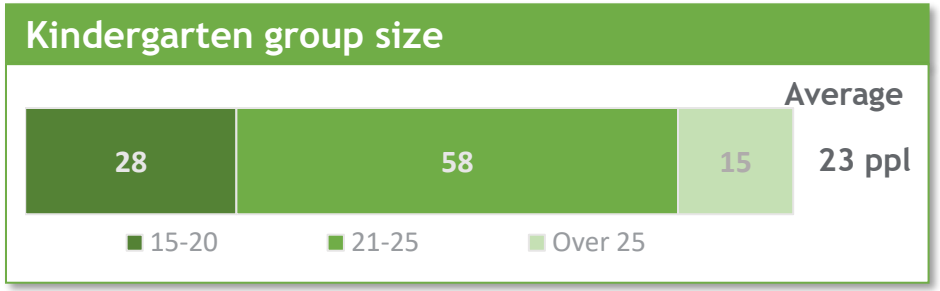
Maintenance



Kindergarten group types



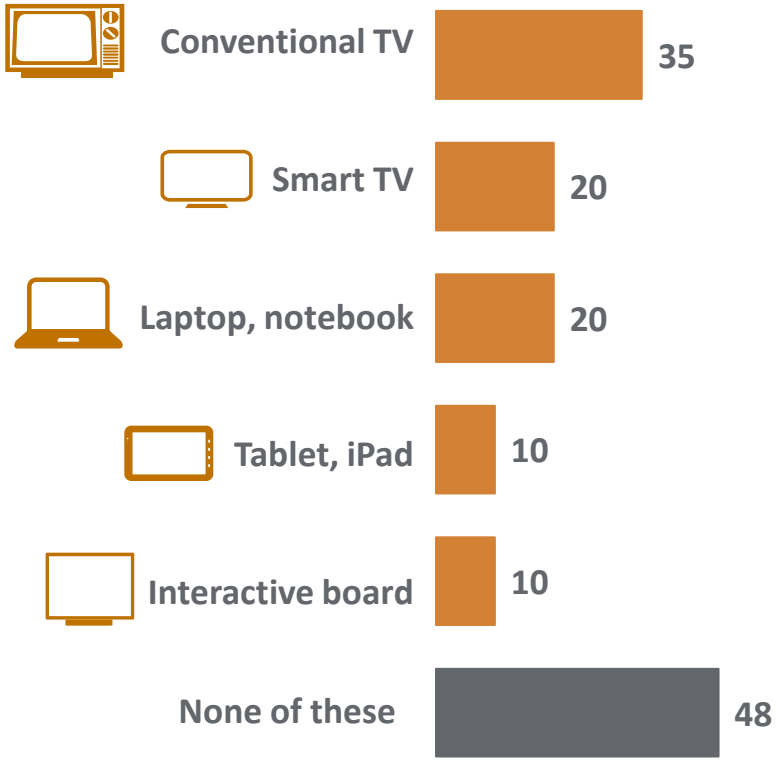
Kindergarten group size

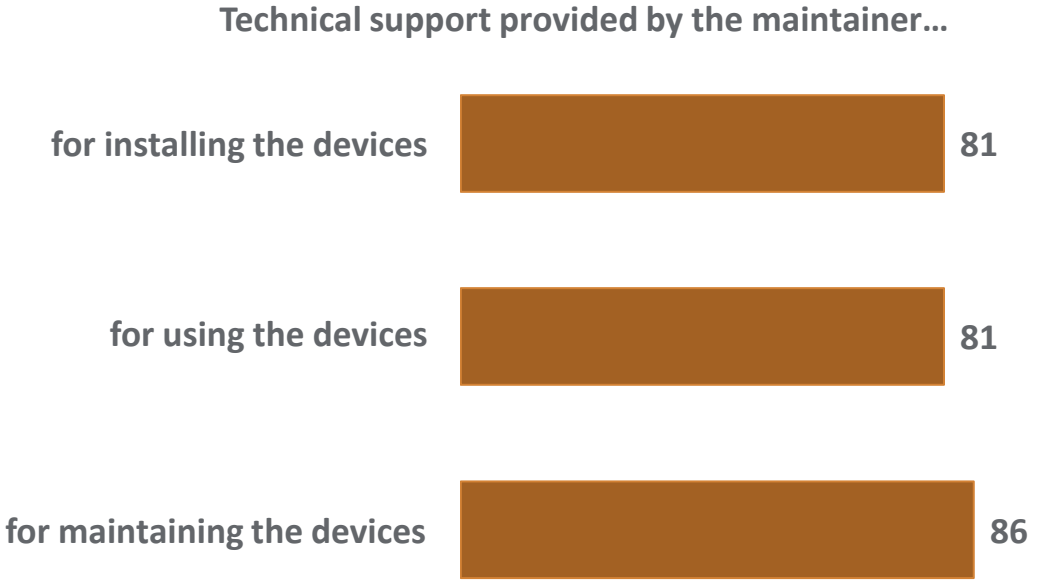


Base: all respondents [n=40] | Data in % of respondents

DIGITAL DEVICE PENETRATION IN KINDERGARTENS

Every second kindergarten has any kind of portable smart device that is specifically used by the children. The maintainer of the kindergartens usually provide technical support for both installing, using and maintaining the devices.

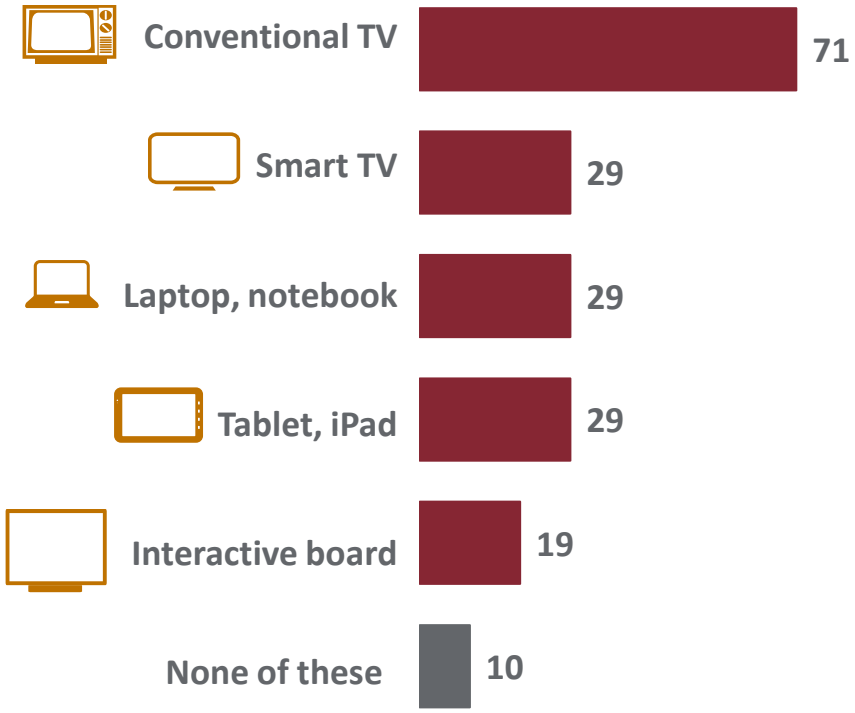


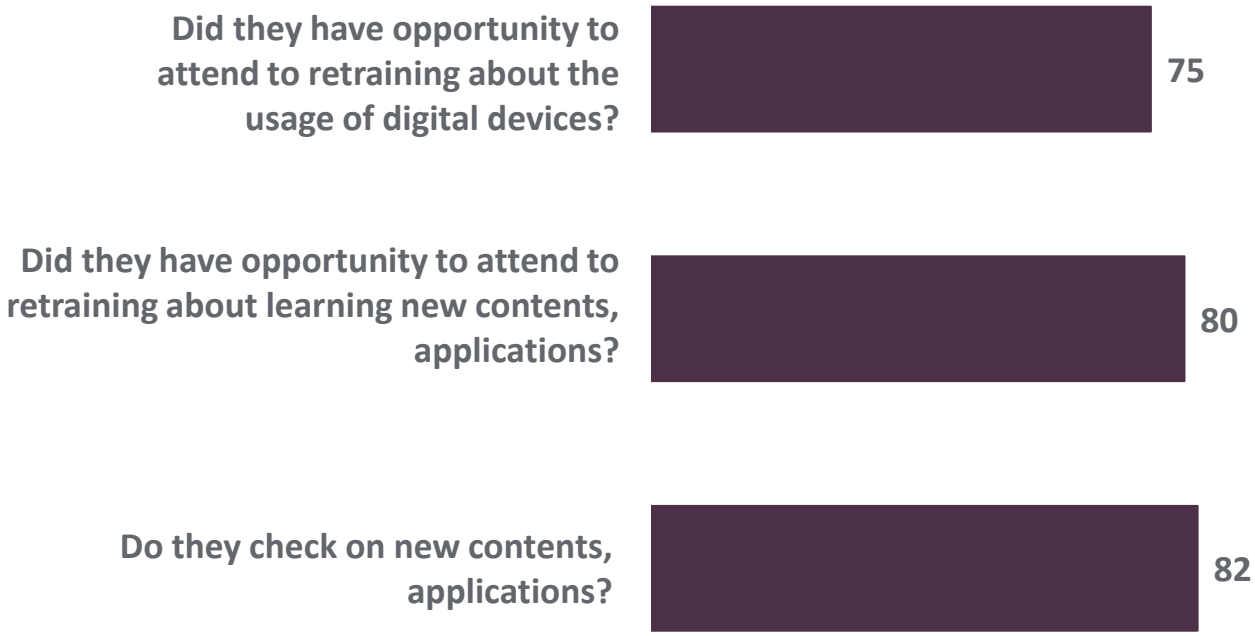


Which of the following devices are available in the kindergarten specifically for the children to use? Base: all respondents [n=40]
Do you receive any support from the maintainer... /installing / using / maintaining the devices? Base: where there are any kind of digital devices available in the kindergarten [n=21]

USAGE OF DIGITAL DEVICES IN THE KINDERGARTEN

9 out of 10 kindergarten teacher are committed to using digital devices. They have the opportunity to attend to retraining, learning about new contents, applications and they also actively check on novelties in the topic.

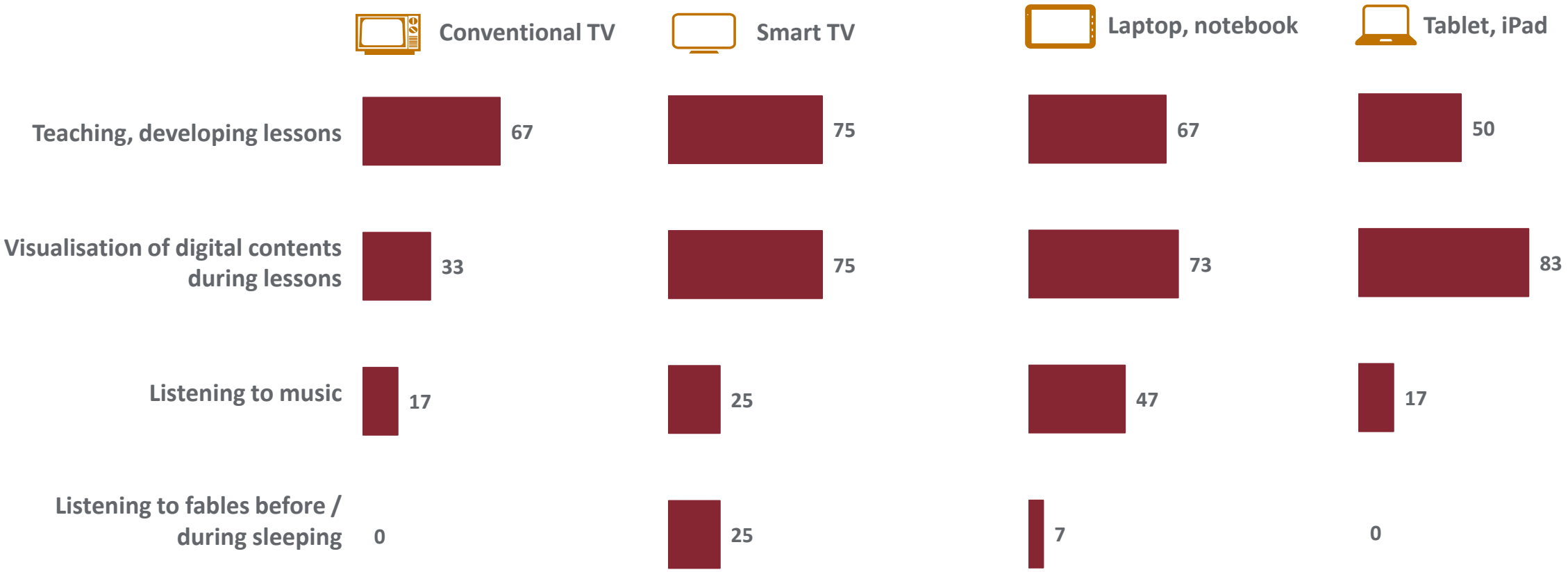




Which of these devices do you usually use during your work in the kindergarten with the children?
Did you have any opportunities to attend to retraining about the usage of digital devices?|Do you have the opportunity to attend to retraining where you learn about new contents, applications? |Do you check on new contents, applications?
Base: where there are any digital devices in the kindergarten [n=21]

USAGE OF DIGITAL DEVICES IN THE PRESCHOOL

Digital devices are used the most often during teaching, developing lessons for the visualisation of digital contents.

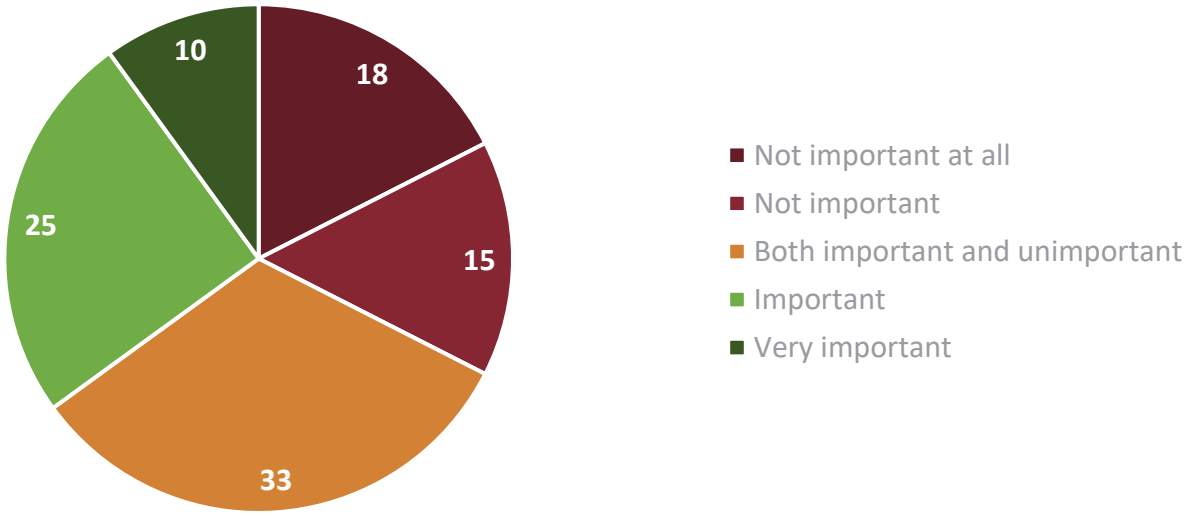


For what do you use the conventional TV with the children?
For what do you use the smart TV with the children?
For what do you use the laptop, notebook with the children?
For what do you use the tablet, iPad with the children?
Base: where there are any digital devices in the kindergarten [n=21]

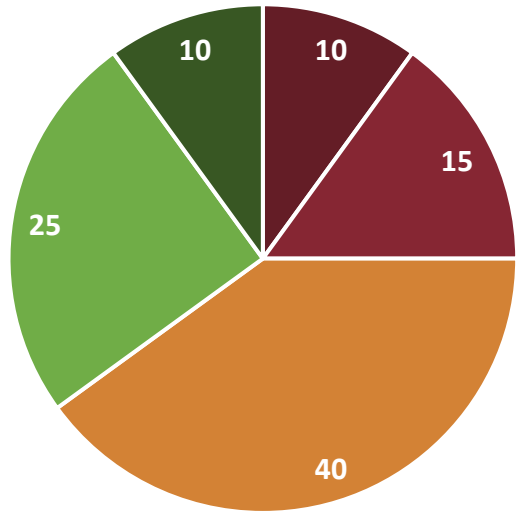
IMPORTANCE OF THE PRESENCE AND USAGE OF DIGITAL DEVICES ACCORDING PRESCHOOL TEACHERS

According to preschool teachers, it is important already at the age of kindergarten that digital devices should not only be present, but they should also be used during the lessons.

Importance of the presence of digital devices during kindergarten lessons



Importance of the usage of digital devices during kindergarten lessons

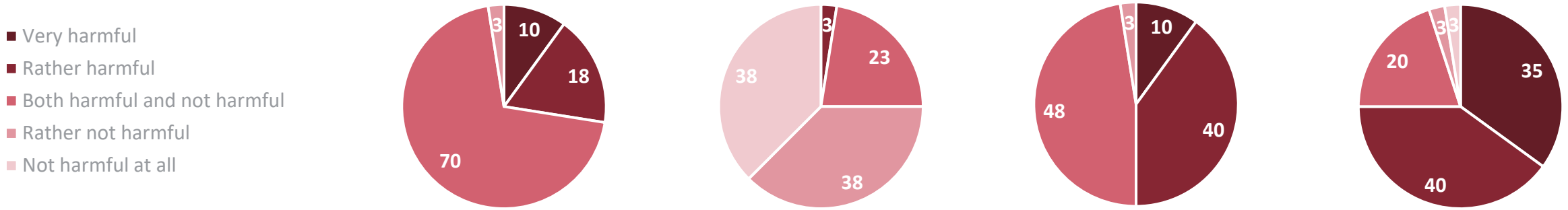


How important do you think it is, digital devices to be present during kindergarten lessons?
And how important do you think it is, to use digital devices during kindergarten lessons?
Base: all respondents [n=40]

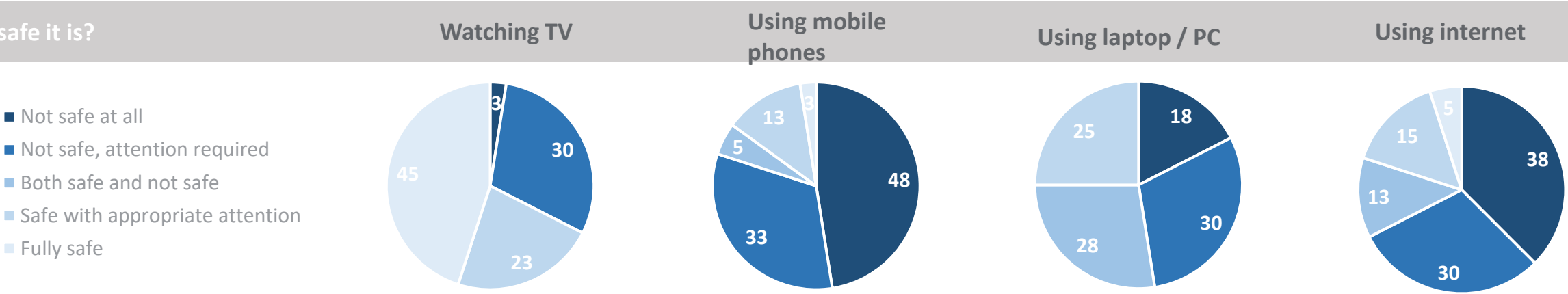
JUDGEMENT OF THE USAGE OF DIGITAL DEVICES AMONG PRESCHOOL TEACHERS

According to preschool teachers, the usage of cell phones and the internet are the most harmful, and these are also the least safe to use for children of this age.

How harmful it is?



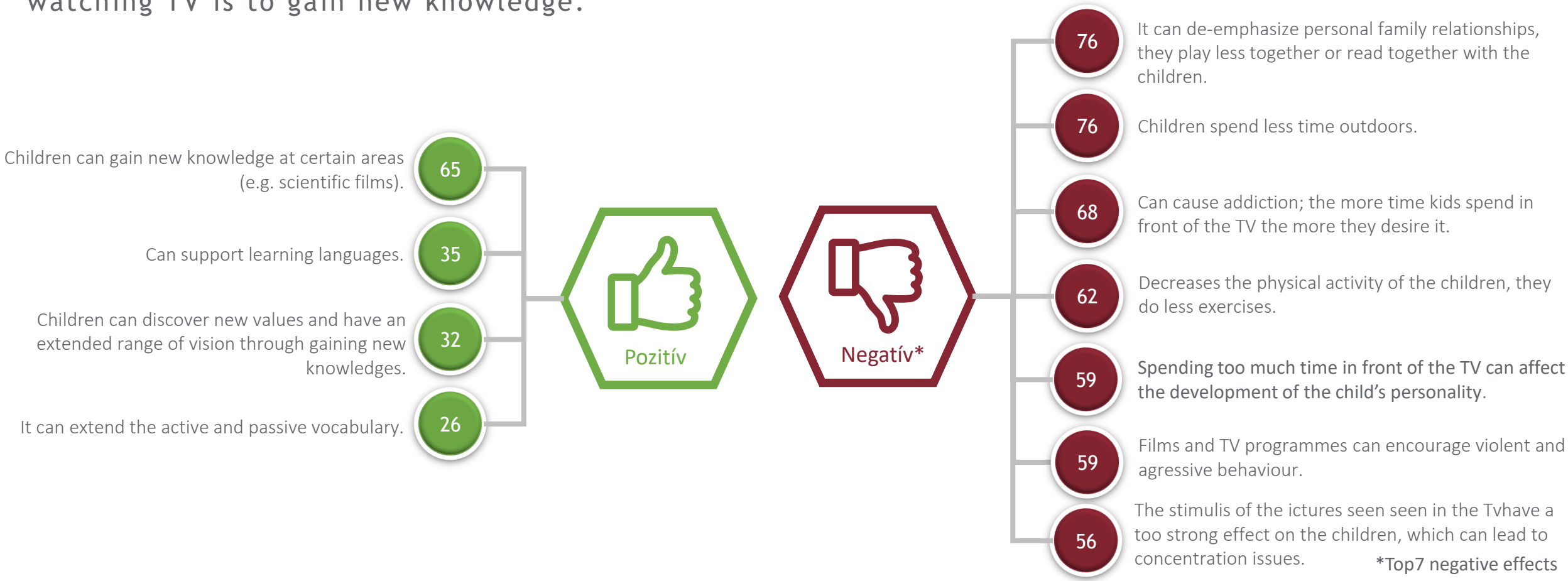
How safe it is?



How harmful do you think that children of preschool age already watch TV? How safe do you think watching TV is for a child in preschool age?
How harmful do you think that children of preschool age already use mobile phones? How safe do you think the usage of mobile phone is for a child in preschool age?
How harmful do you think that children of preschool age already use tablets / laptops / PCs? How safe do you think the usage of tablets / laptops / PCs are for a child in preschool age?
How harmful do you think that children of preschool age already use the internet? How safe do you think internet usage is for a child in preschool age?
Base: all respondents [n=40]

EXPERIENCE OF PRESCHOOL TEACHERS WITH WATCHING TV

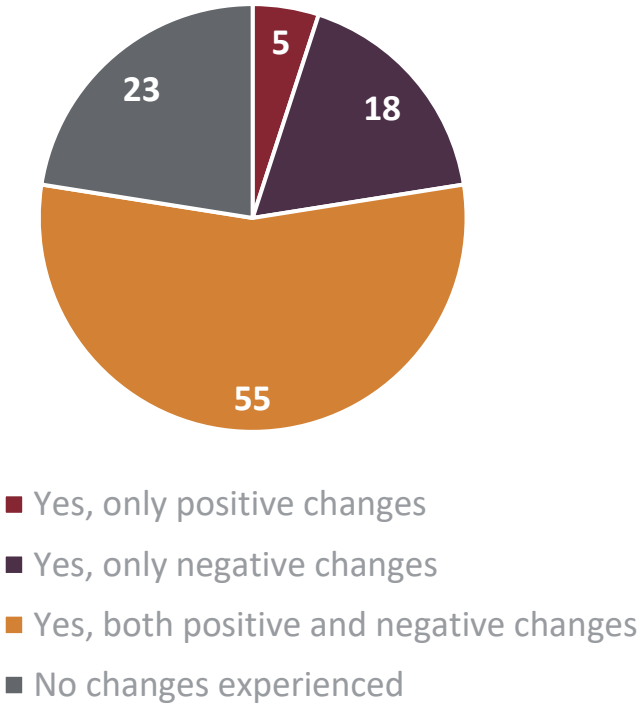
According to kindergarten teachers, watching TV takes away the space from family activities, and prevents children from physical exercises and from doing outdoor activities. Also, it can affect the development of the child's personality and can lead to concentration issues. The main advantage of watching TV is to gain new knowledge.



Based on your experiences what kind of effects does watching TV has on children of preschool age? Please select from the list below those that you think could affect children already in the preschool age.
Base: all respondents [n=40]

CHANGES EXPERIENCED IN THE USAGE OF DIGITAL DEVICES BY CHILDREN OF PRESCHOOL AGE

Kindergarten teachers rather experience a negative tendency.



Positive changes

- Children handle digital devices better and better which can contribute to the development of eye-hand coordination and fine motor skills.
- Children of preschool age usually watch cartoons which helps to improve their vocabulary, enhance their fantasy.

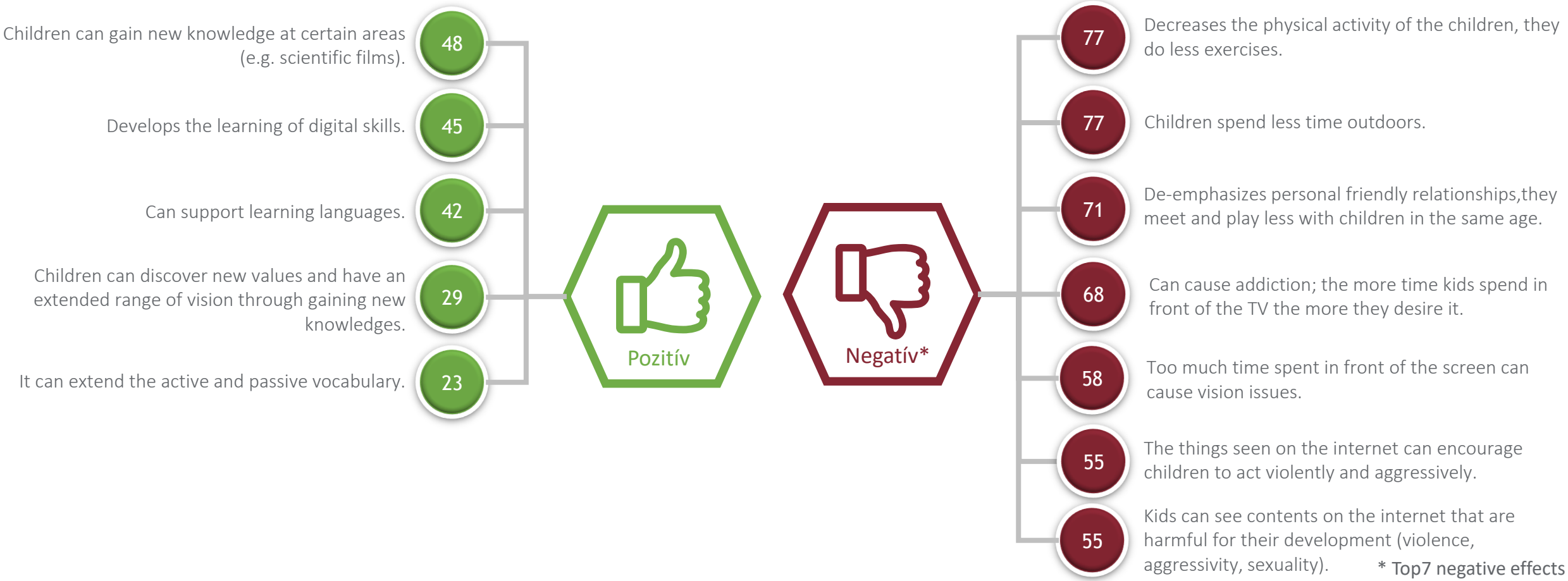
Negative changes

- Kids spend more and more time in front of the device instead with the family, or outdoors.
- Has a specifically negative effect on personal relationships, family members talk to each other less.
- Kids verbal communication deteriorates, issues with listening comprehension arise.
- More and more children suffers from brain-fag.
- It can affect the development of their personality, if they don't watch the appropriate contents matching their age, and if they play with violent, aggressive games too much that can affect their relationships. Occasionally it can result in aggressive behaviour.

Have you experienced any change in the digital maturity of the children of preschool age compared now and 5 years ago? [n=40]
What kind of positive changes have you experienced? Please specify. Base: those who experiences positive changes[n=24]
What kind of negative changes have you experienced? Please specify. Base: those who experiences negative changes [n=29]

EXPERIENCE OF PRESCHOOL TEACHERS – DIGITAL DEVICES

Main risks: insufficient physical exercises, not enough time spent outdoors, addiction, depreciating personal friendly and family relationships. Can cause addiction and can affect harmful the development of their personality. Too much time spent in front of the screen can cause vision issues. The main advantage is that they can gain new knowledges.

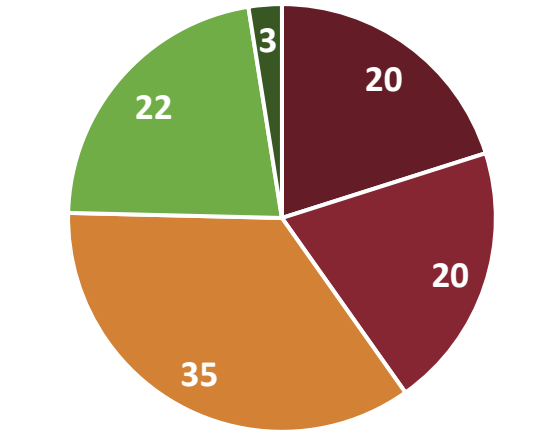


* Top7 negative effects

Based on your experiences what kind of effects does the usage of digital devices (tablet, laptop, mobile phone) has on children of preschool age? Please select from the list below those that you think could affect children already in the preschool age.
Base: all respondents [n=40]

IMPORTANCE OF GAINING DIGITAL SKILLS BY SCHOOL AGE

Kindergarten teachers think that it is more and more important for children to manage digital devices well by the age they are attending school.



Importance of using digital devices:

- Preschool teachers think that schools expect children to manage digital devices well by the age they attend school.
- Children who are able to sue the interactive board have an advantage. They get tasks that require solutions that must be checked on the internet.
- It is an important tool for building social relationships, since in school age online connection gains a higher emphasis.

Lack of learning digital skills:

- Corona virus brought children starting the first class who were less mature digitally in a though situation with distance learning. For them it was harder to switch to online learning, and they required more attention from the parents as well.

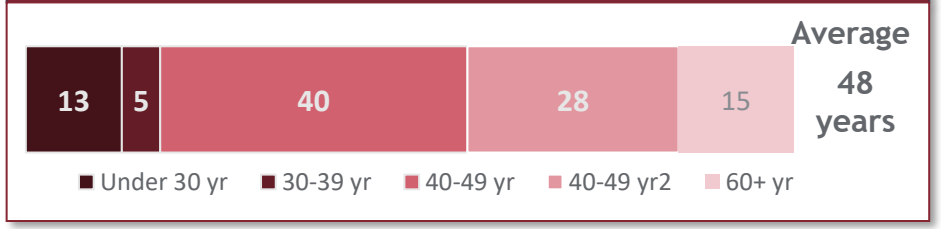
How important do you think it is that children should manage digital devices well by school age?
Why do you think it is important for children to be digitally mature by the time they attend school?
What kind of disadvantages do you think children could face if they cannot manage digital devices well by the time they attend to school?
| Base: all respondents [n=40]

ELEMENTARY TEACHERS

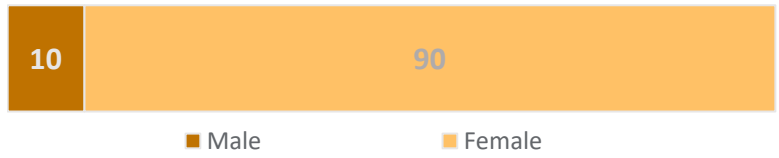
RESEARCH SAMPLE

Age, professional experience and working conditions of teachers.

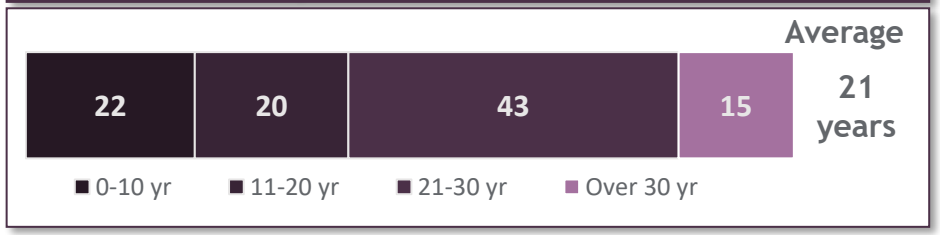
Age of teachers



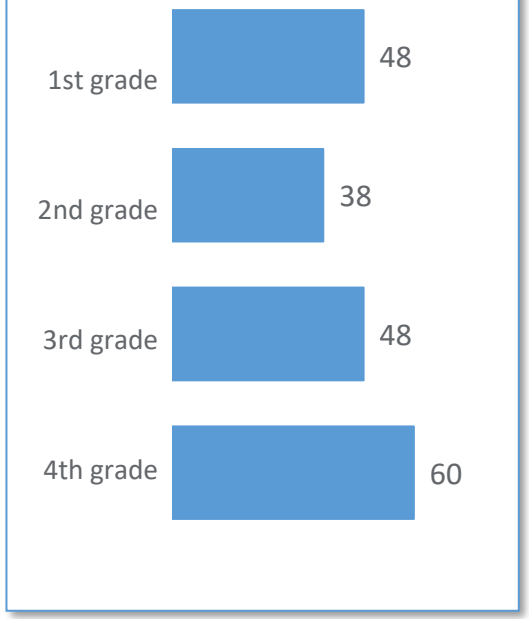
Gender of teachers



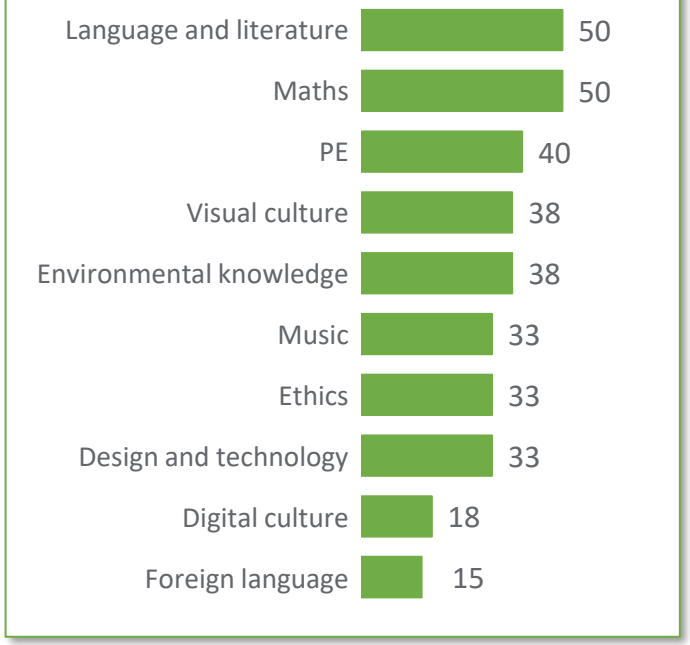
Professional experience of teachers



In which grade do they teach?



What subjects do they teach?

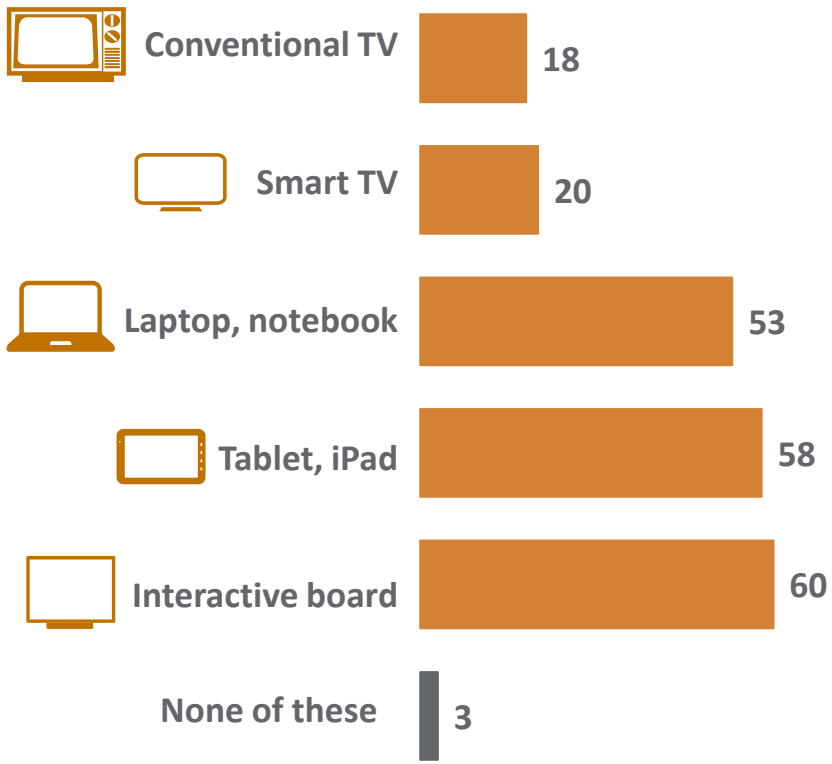


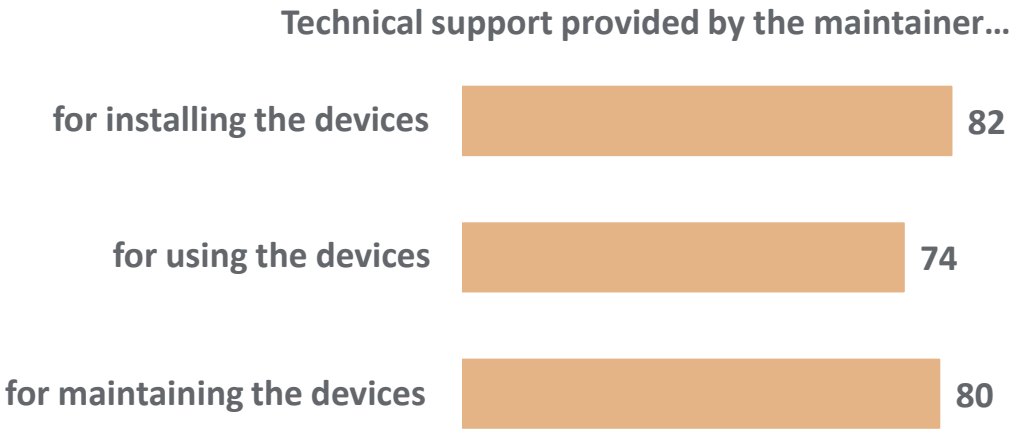
Location of school

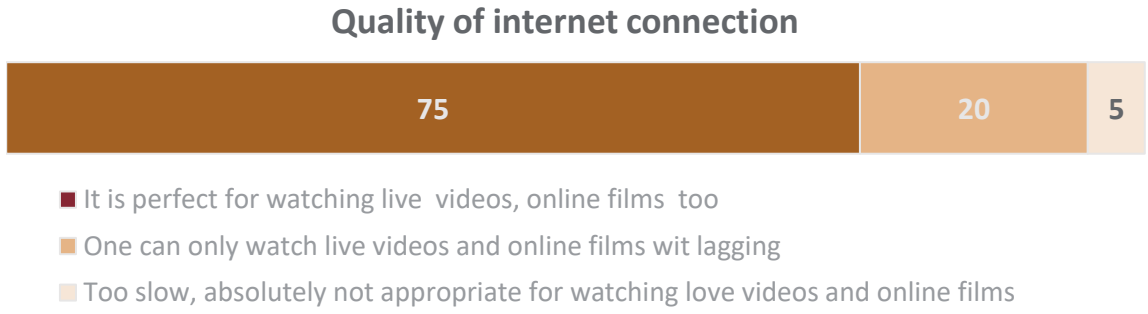
Base: All respondents [n=40] | Data in % of participants

DIGITAL DEVICE PENETRATION IN SCHOOLS

Almost every elementary school has any kind of digital device specifically for the children. In the majority of the schools the quality of the internet connection is satisfying.





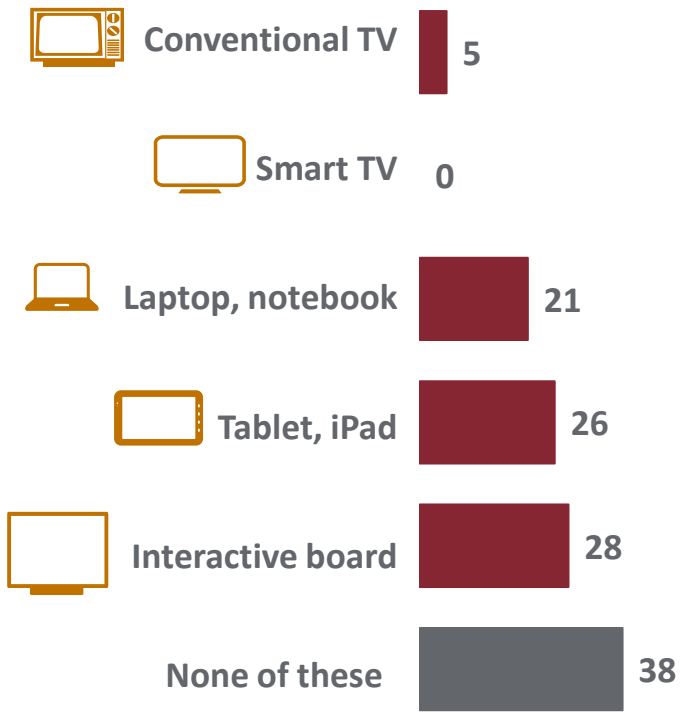


Which of the following devices are available in the elementary school specifically for the children to use? Base: all respondents [n=40]
Do you receive any support from the maintainer... /installing / using / maintaining the devices? Base: where there are any kind of digital devices available in the elementary school [n=39]
How would you rate the quality of the internet connection? Base: where there are any kind of digital devices available in the elementary school [n=39]

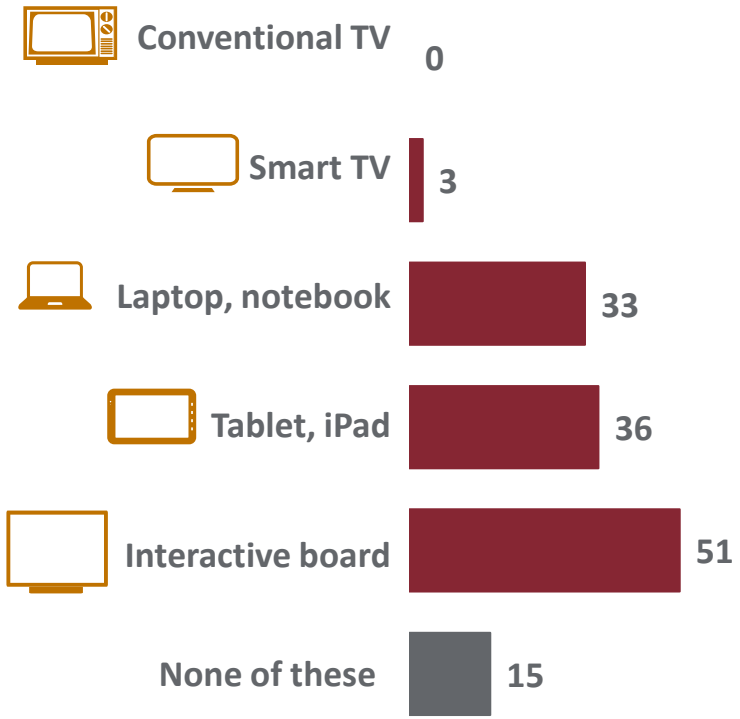
USAGE OF DIGITAL DEVICES IN THE LOWER ELEMENTARY GRADE

In the lower elementary grade teachers mostly use interactive boards and portable computers.

Digital devices that can be provided for lower grade students



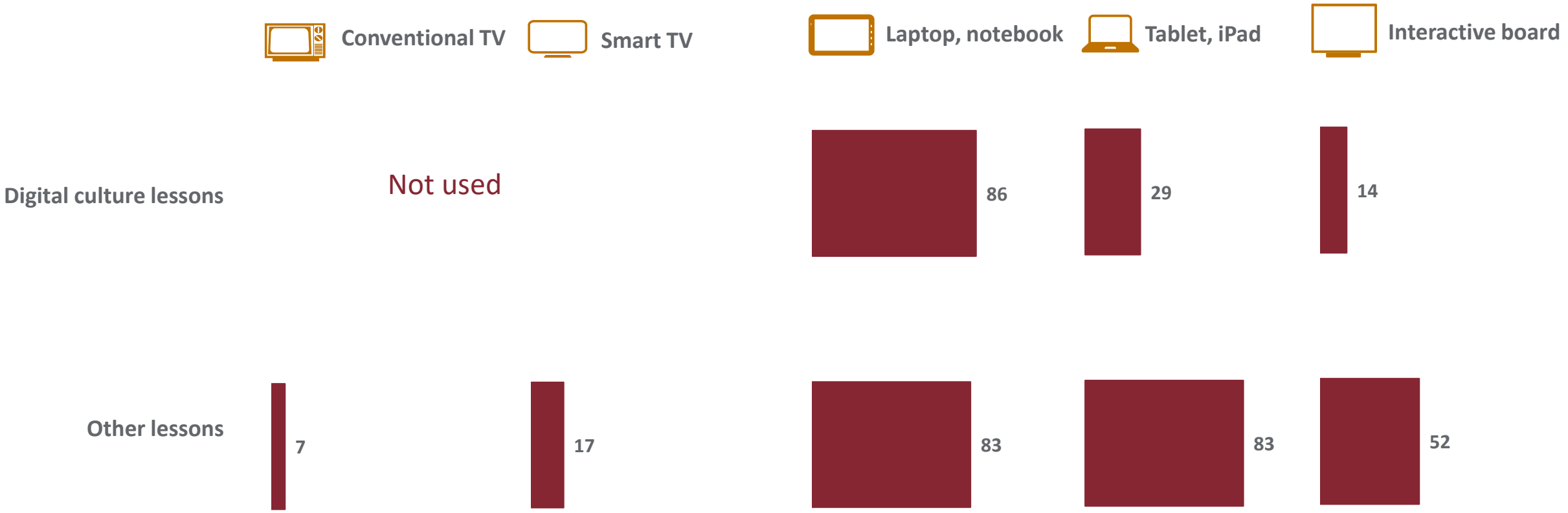
Digital devices that are used by teachers in the lower grade



Which are those devices that can be provided by the school for lower grade students for own usage?
Which devices are usually used during the classes of lower grade students?
Base: those who use digital devices [n=34]

USAGE OF DIGITAL DEVICES IN THE LOWER ELEMENTARY GRADE

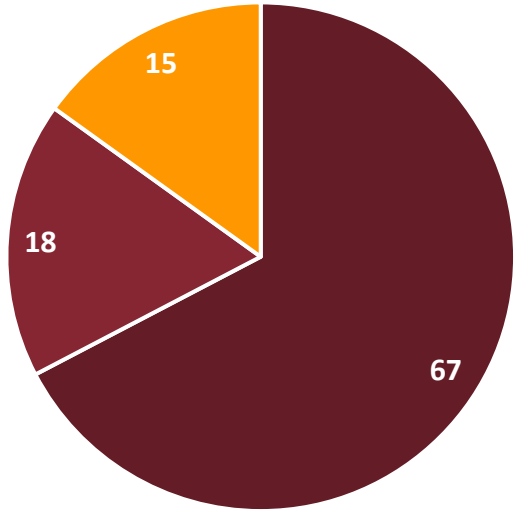
Teachers use mainly laptops in the lower grade both on digital culture and other classes.



Which of these devices do you use during ...?
Base: those who use digital devices [n=34]

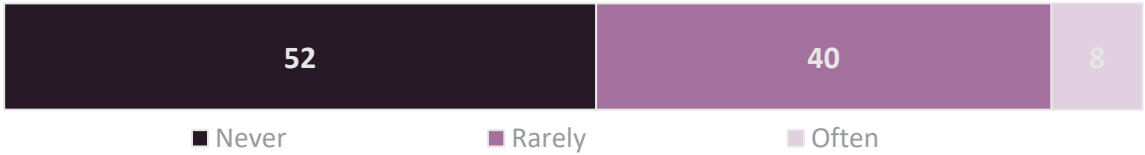
RESTRICTIONS ON THE USAGE OF DIGITAL DEVICES IN SCHOOLS

In the majority of the schools (85%) students have to hand in their mobile phones or any other digital devices they have in the morning or before classes. But even with such strict rules teachers still have to use discipline or confiscate digital devices from kids sometimes.

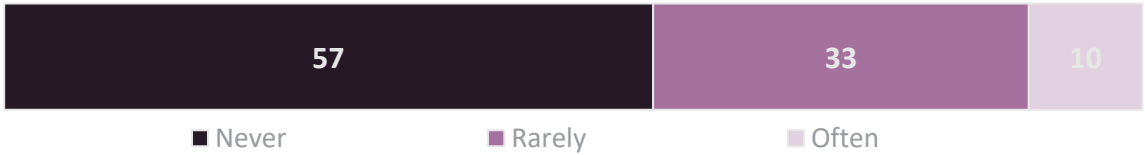


- They have to hand them in in the morning and they get it back only after classes
- They have to hand them in before the class, but they get it back after the class for the break
- No restrictions, they can have their devices on them during all day

Did it occur to you that you had to use discipline during classes due to the usage of mobile phone or any other gadgets (e.g. tablet, smart watch, etc.)?



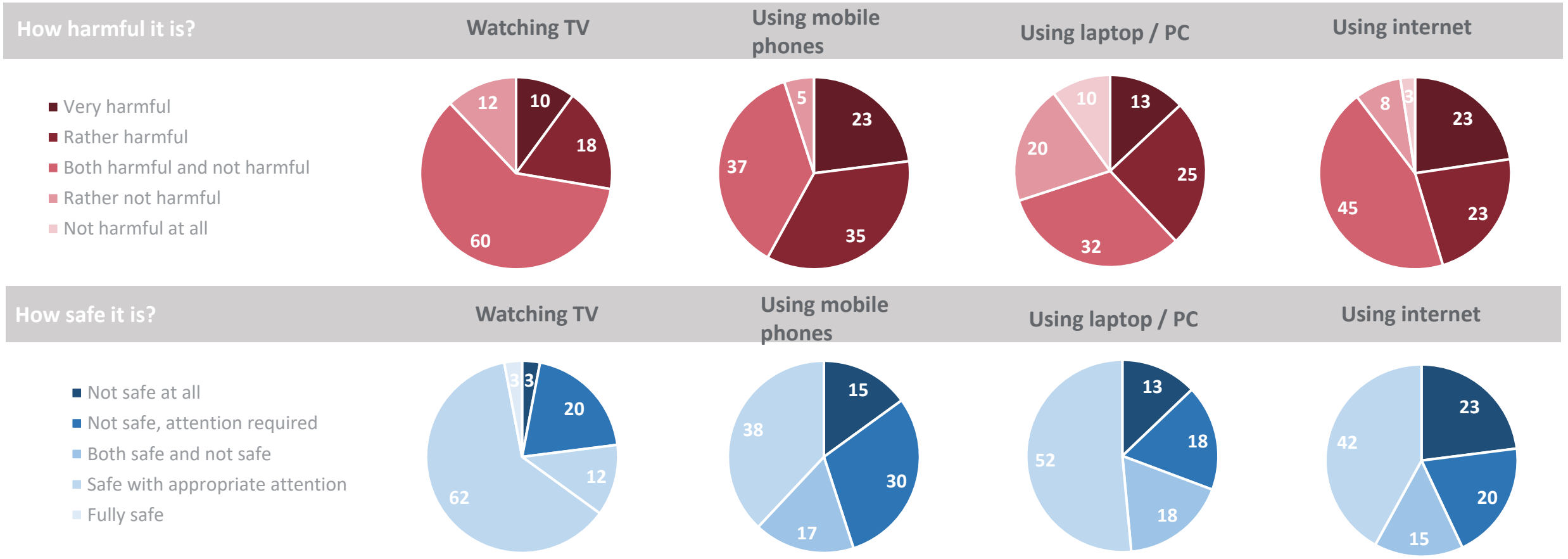
Did it occur to you that you had to confiscate a mobile phone or any other gadgets (e.g. tablet, smart watch, etc.) during classes?



Elementary schools have different protocols whether lower grade students could have their mobile phones or any other digital gadgets (tablet, smart watch, etc.) during classes. What is the practice in your school?
Did it occur to you that you had to use discipline during classes due to the usage of mobile phone or any other gadgets (e.g. tablet, smart watch, etc.)?
Did it occur to you that you had to confiscate a mobile phone or any other gadgets (e.g. tablet, smart watch, etc.) during classes?
Base: all respondents [n=40]

JUDGEMENT OF THE USAGE OF DIGITAL DEVICES AMONG TEACHERS

According to preschool teachers, the usage of cell phones, PCs and the internet are the most harmful, and these are also the least safe to use for children of lower grade age. Watching TV is considered as safe with appropriate attention.

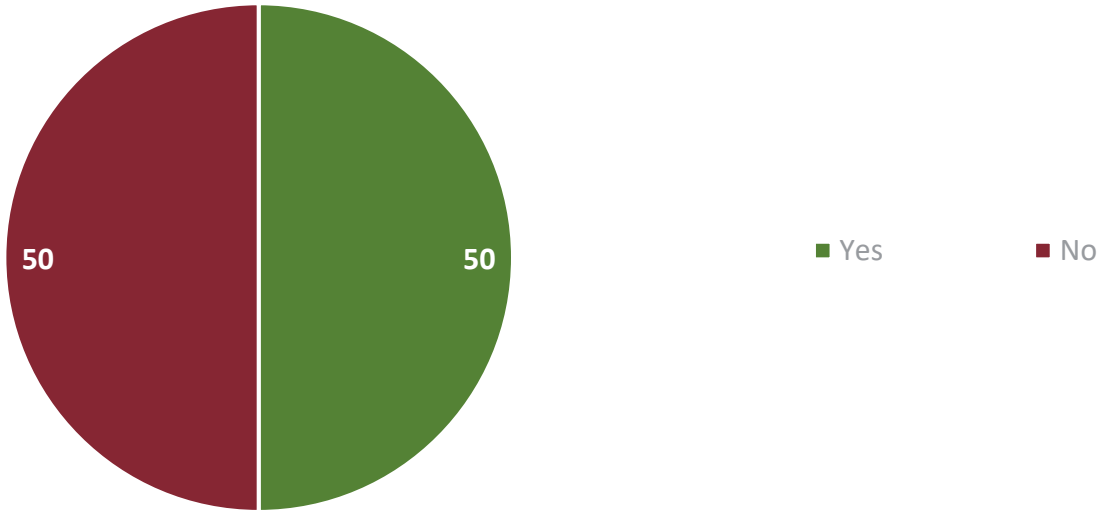


How harmful do you think that children at lower-school age already watch TV? How safe do you think watching TV is for a child at lower-school age?
How harmful do you think that children at lower-school age already use mobile phones? How safe do you think the usage of mobile phone is for a child at lower-school age?
How harmful do you think that children at lower-school age already use tablets / laptops / PCs? How safe do you think the usage of tablets / laptops / PCs are for a child at lower-school age?
How harmful do you think that children at lower-school age already use the internet? How safe do you think internet usage is for a child at lower-school age?
Base: all respondents [n=40]

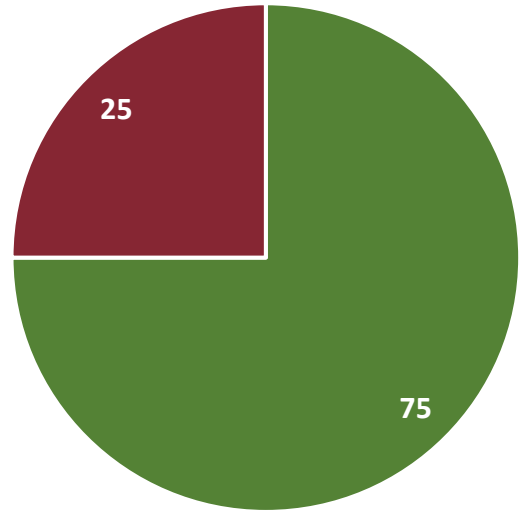
JUDGEMENT OF THE USAGE OF DIGITAL DEVICES AMONG TEACHERS

The majority of the teachers found it important to talk with both the kids and their parents about the usage of digital devices, but especially about the dangers they can have.

Do you do courses / trainings for <u>parents</u> about the usage and dangers of digital devices and the internet?



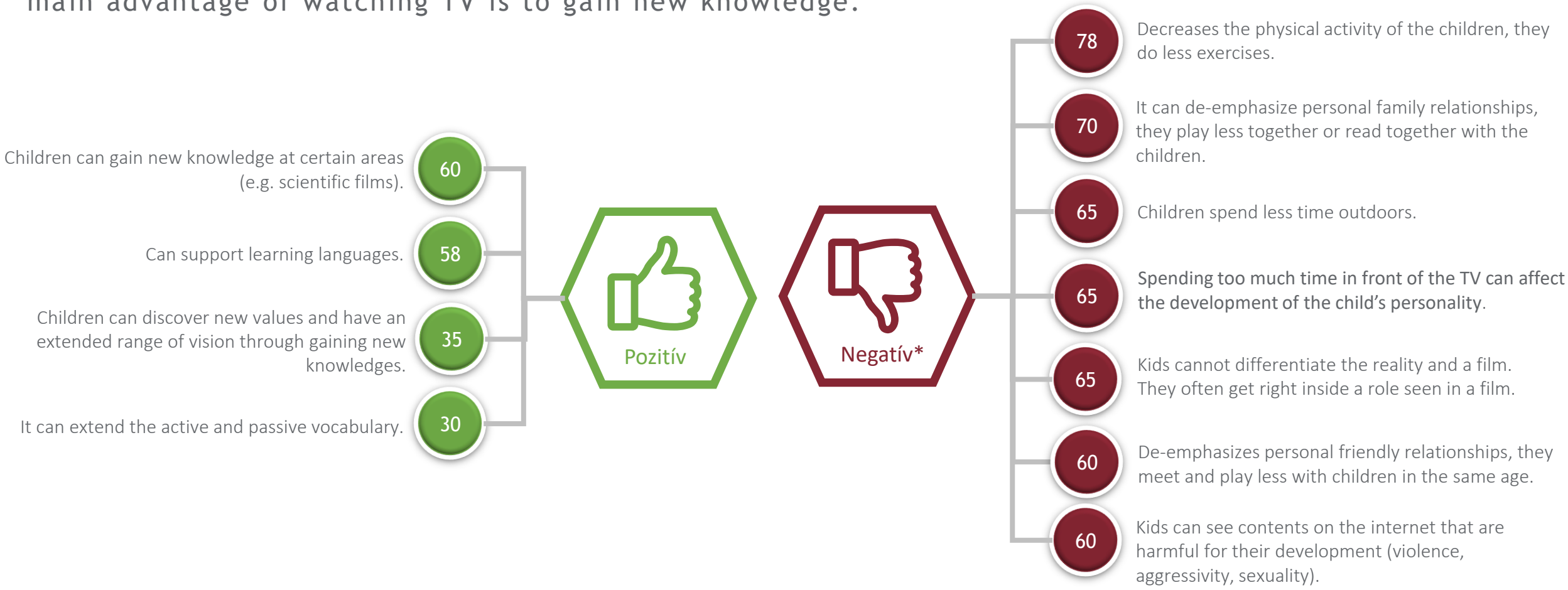
Do you do courses / trainings for <u>kids</u> about the usage and dangers of digital devices and the internet?



During your work do you do courses / trainings for parents about the usage and dangers of digital devices and the internet?
During your work do you do courses / trainings for kids about the usage and dangers of digital devices and the internet?
Base: all respondents [n=40]

EXPERIENCE OF TEACHERS WITH WATCHING TV

According to teachers, watching TV takes away the space from family activities, and prevents children from physical exercises and from doing outdoor activities. Also, it can affect the development of the child's personality, since they can see contents via the TV that is harmful for their development. The main advantage of watching TV is to gain new knowledge.

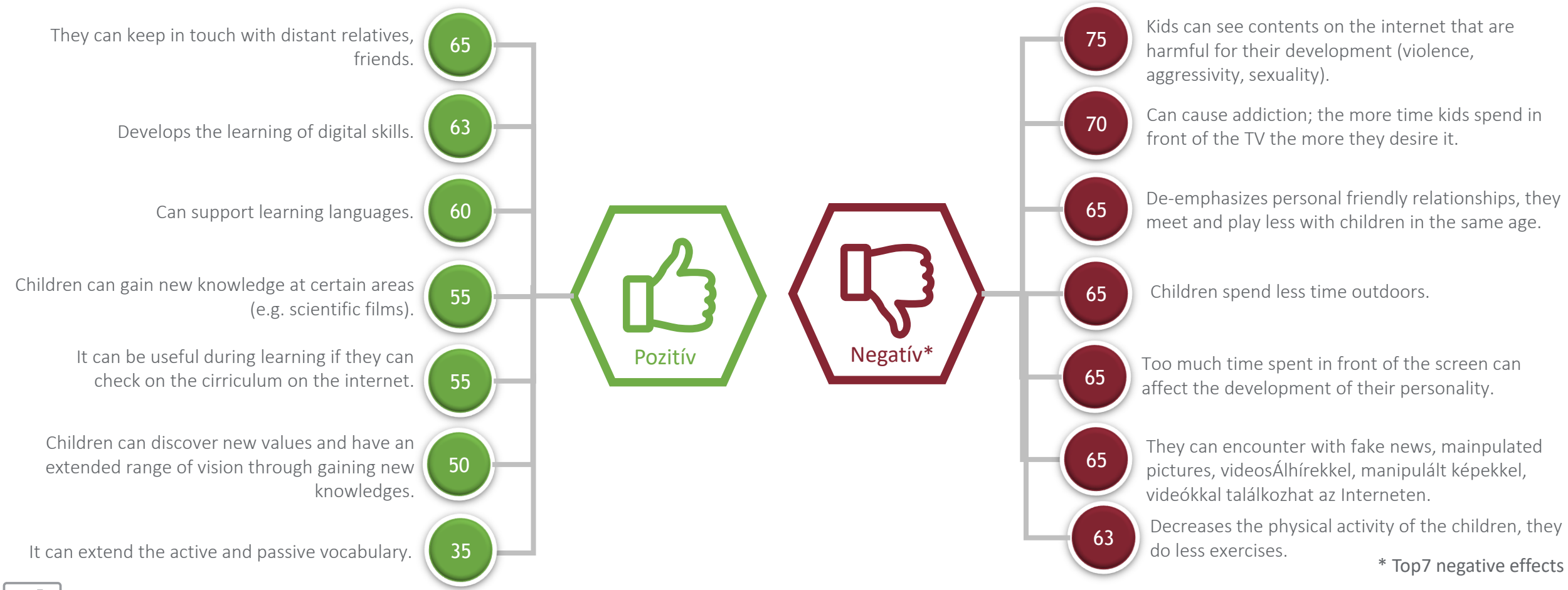


* Top7 negative effects

Based on your experiences what kind of effects does watching TV has on children at lower-school age? Please select from the list below those that you think could affect children already in the lower-school age.
Base: all respondents [n=40]

EXPERIENCE OF TEACHERS – DIGITAL DEVICES

Main risks: Can cause addiction, and it can affect the development of the child's personality, since they can see harmful contents, fake news, manipulated pictures on the internet. The main advantage is communication, however, excessive usage can damage personal friendly relationships.



* Top7 negative effects

Based on your experiences what kind of effects does the usage of digital devices (tablet, laptop, mobile phone) has on children at lower-school age? Please select from the list below those that you think could affect children already in the lower-school age.
Base: all respondents [n=40]

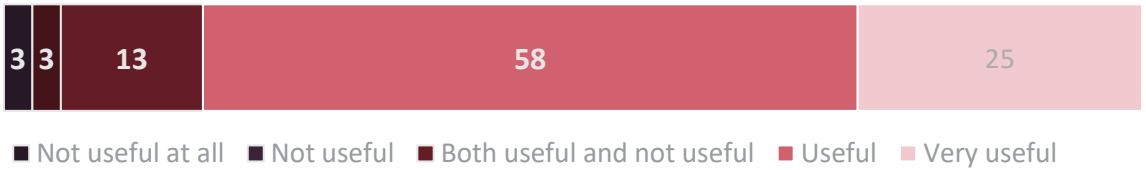
IMPORTANCE OF DIGITAL CULTURE SUBJECT ACCORDING TO TEACHERS

Teachers think that children get acquainted with the usage of digital devices according to their age during digital culture classes. They believe that the subject is important and useful, during which children gain competences that can be utilized during other classes too. In 85% of the schools the classes are held in the computer science room.

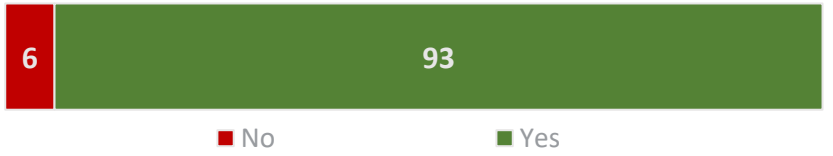
Importance of digital culture subject

Importance of using digital devices during digital culture class

Usefulness of digital culture subject

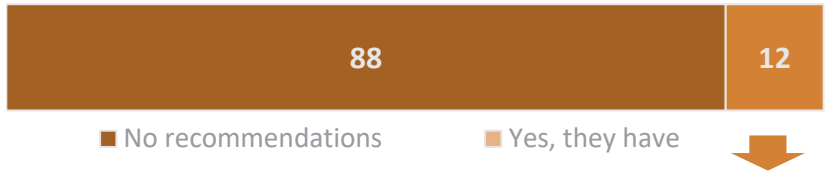


Utilization of skills gained during digital culture classes during other subjects



Utilization of skills gained during digital culture classes during other subjects held by the teacher

Recommendations for change

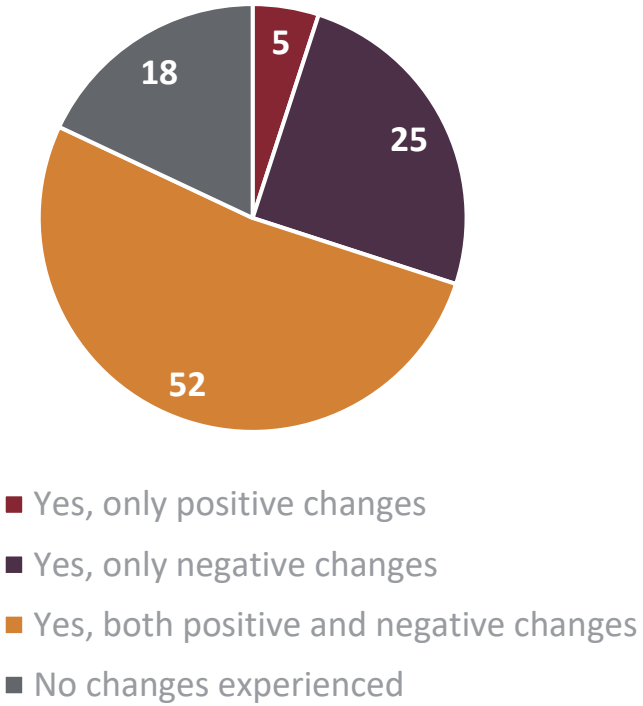


A higher emphasis should be put on the safety of the internet usage

How important do you think digital culture to be included in the lower-school curriculum?| How important do you think it is to use digital devices during digital culture classes by the students?| According to you the knowledge gained during digital culture classes can be utilized in other subjects as well? | Are the competences gained during digital culture classes during the subjects you hold?| Would you change anything in the curriculum of the digital culture subject? If yes, please specify your suggestion. | Base: all respondents [n=40]

CHANGES EXPERIENCED IN THE USAGE OF DIGITAL DEVICES BY CHILDREN AT LOWER-SCHOOL AGE

Teachers rather experience a negative tendency.



Positive changes

- Lower emphasis is needed to tell where to find things on the screen, on the keyboard, mouse usage is easier too. On the other hand, wrong conditioning is harder to be corrected. When the use a tablet during classes, they don't need time to tell how to use the device.
- Kids are more independent, have better problem-solving skills.
- They have a broader mind. The inform themselves more easily and are more well-informed than before.

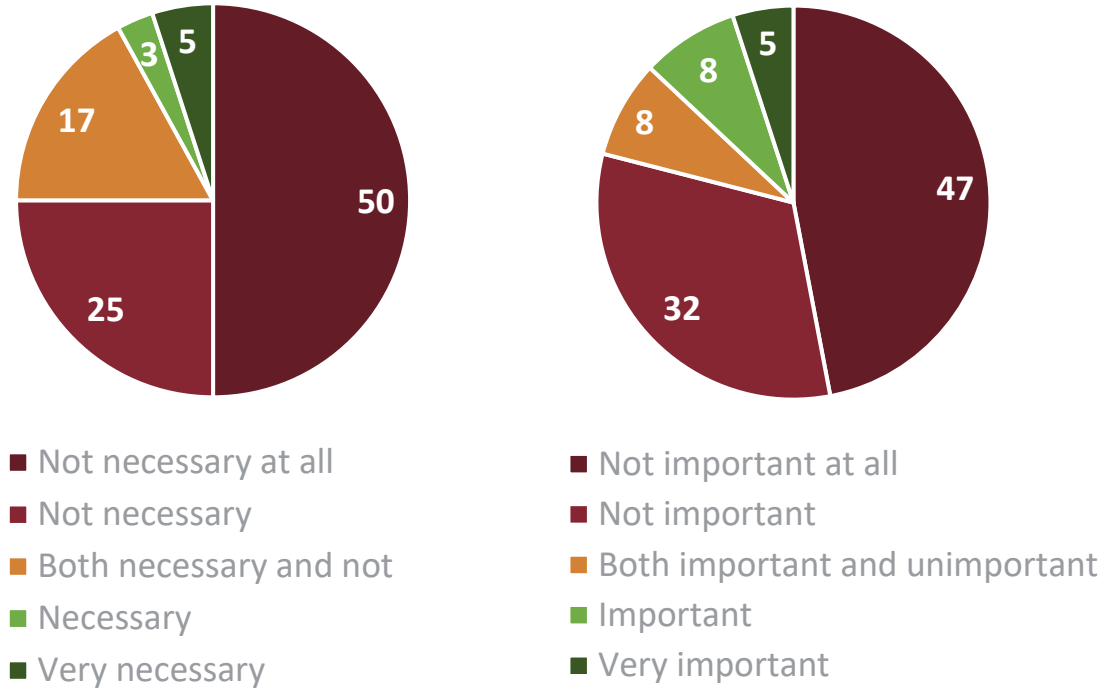
Negative changes

- Students who have more experience are usually the same who get too excited easily resulting in behaviour issues during the classes.
- They do not search for and prioritize contents that match their age. This can also result in serious educational situations and it is also a collision-point with the foster.
- They do not want to use the classic tools, that are used in the school, e.g. pencil, exercise book, book, etc.
- They do not want classic homework, they want to work almost exclusively on digital devices (LearningApps and WorldWall exercises).
- They spend way too much time in the digital world.

Have you experienced any change in the digital maturity of the children of lower school age compared now and 5 years ago? [n=40]
What kind of positive changes have you experienced? Please specify. Base: those who experiences positive changes[n=24]
What kind of negative changes have you experienced? Please specify. Base: those who experiences negative changes [n=29]

IMPORTANCE OF GAINING DIGITAL SKILLS BY SCHOOL AGE

Teachers think that it is not important for children to manage digital devices well by the age they are attending school. Schools do not have expectations for the digital device usage of children.



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There are no expectations for kids' digital device usage in the schools.

Importance of using digital devices:

- There are plenty of learning-helping programs, these can be very useful with the appropriate adult help and guidance.
- Teachers think that the usage of digital devices are more important in higher grades and in high school.

Lack of learning digital skills:

- In the lower-school tasks can be done with very basic digital skills, so those who are unable to manage well digital devices for the school start have no disadvantage at this point.
- Schools find it appropriate if the kids improve their digital culture during the lower-grades continuously according to the schools' expectations.

According to your experiences does the knowledge / usage of digital devices help to reach the conditions of school maturity? | How important do you think it is that children should manage digital devices well by school age? | Is there any expectation in your school regarding the usage of digital devices for kids? | Why do you think it is important for children to be digitally mature by the time they attend school? |What kind of disadvantages do you think children could face if they cannot manage digital devices well by the time they attend to school? Please specify. | Base: all respondents [n=40]

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