

WHITEPAPER

THE EVOLUTION OF PLAY SPACES IS CHANGING:

How Synthetic
Playground Turf
Meets These
Changing Needs and
Why Kids Love to
Play on It



PLAYGROUND GRASS™



by ForeverLawn®

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INTRODUCTION

A great deal more is known today about the benefits of play (particularly outdoor play) to children's development, largely due to research conducted and scientific observations of children at play over the last ten years. And it's not just academia that are aware of these benefits. With the pandemic stay-at-home orders and social distancing requirements, parents and families experienced first-hand the negative impacts that lack of outdoor play has on their children's mental and physical wellbeing. This awareness is still driving change in play needs across the globe and forcing evolution in play spaces and community development.

And, while safety is still paramount in play spaces, it's much more than that. Designers, park officials, and educational system administrators must also consider a myriad of new factors that the changing play needs are creating. These include more creative playground and park designs, inclusivity of all ages and abilities, age-appropriate play areas, playground flow from area to area, and utilizing improved surfacing options and equipment, to name a few.

This white paper recaps the benefits of play, why outdoor play is so critical, and how exactly the state of play is changing. We will show how the playground industry is evolving to meet the needs of their communities and how synthetic turf is uniquely qualified to help.

Through insights uncovered from secondary and primary qualitative research conducted for this white paper, we will show why the playground surface decision must be at the forefront of playground design versus at the middle or the end and how synthetic turf improves safety *while* stimulating design versus stifling it. This white paper will also bring to light some interesting insights as to how synthetic turf aids in child development and why children are drawn to it naturally. We will also outline some unexpected benefits that the utilization of synthetic turf brings to communities and their economies that were uncovered during the research.



THE IMPORTANCE OF PLAY: PLAY NEED STATES THAT ARE DRIVING CHANGE

Increasing Demand for Year-Round Outdoor Play

In a recent study by the "Voice of Play," 80% of parents said their kids enjoy playing outdoors significantly more than playing indoors. But it doesn't just stop at preference. As outdoor play continues to be scientifically studied and documented, the benefits are more and more apparent. There are a multitude of reasons why outdoor play is critical, from improving a child's overall physical health as well as aiding social, cognitive, and emotional development. Perhaps kids inherently know what is best for themselves!

- Outdoor play tends to get kids moving more. A recent study found that when outdoor play is child-led the amount of vigorous physical activity compared to moderate physical activity increased to 17% compared to 1%.
- Nature deficit disorder: Children's behavior suffers from lack of access to outdoor space. New scientific research shows that playing outdoors helps children concentrate better and follow directions. When getting outdoor to play, kids are less moody and cranky; they are calmer and even sleep better at night!
- Further, several studies have also found that being outdoors reduced ADHD symptoms (in both those with and without an official diagnosis of the disease) as natural environments have a tendency to restore attention.

Dr. Joe L. Frost, Centennial Professor Emeritus at the University of Texas at Austin, with over 50 years experience in teaching and experience, authored the "History of Children's Play and Play Environments". He discusses how in the past, the abandonment of outdoor play, along with reduced recess and physical education, has resulted in negative consequences on children's developmental skills and increased childhood obesity. This is further supported by the American Academy of Pediatrics, which states that "Recess is a necessary break in the day for optimizing a child's social, emotional, physical, and cognitive development." Dr. Frost closes his book with the renewed interest in a contemporary child-saving movement to promote free play, outdoor play, and healthy living. That movement continues today and into the future.





OUTDOOR PLAY ENCOURAGES FREE PLAY

What is Free Play and Why Does it Matter?

Free play is unstructured activity that comes naturally from kid's innate curiosity, enthusiasm and love of discovery. It allows children to develop their imaginations while exploring and experiencing the world around them. Outdoor play encourages free play; it allows for all kinds of physical or relaxing activities such as, playing on playgrounds, making up their own running or jumping games, or even just lying on the ground looking at the clouds while imagining shapes. The American Academy of Pediatrics' Clinical Report on the "Importance of Play" lists the many benefits of free play for children.

- Healthy cognitive development.
- Develop motor skills.
- Use of creativity.
- Expanding the imagination.
- Interaction with the world around them.
- Practice decision making.
- Building confidence.
- Social skills-sharing and resolving conflicts.

The report further states that unstructured free play is so important to optimal child development that it has been recognized by the United Nations High Commission for Human Rights as a right of every child.

PLAYGROUND TRENDS – A RESPONSE TO CHANGING PLAY NEEDS

Key Trends in Playgrounds

In a recent qualitative study "Investigating the State of Play," among park officials and education administrators conducted by ForeverLawn® Inc., respondents saw the following positive playground trends:

- Improved playground materials and equipment.
- More options that are safer, of better quality and durability.
- Improved surface materials (to replace rubber mulch, wood mulch, pea gravel and sand).
- Inclusiveness, accessible play surfaces, and structures.
- More stringent codes and increased concern for safety.
- Educational or academic play options:
 - Both in playground equipment and surfaces (music, sensory).
 - Better playground layout and designs.
- Incorporating an understanding how children play into designs:
 - Age and ability appropriate activity areas.
 - Multiple activity areas including at-rest areas.
- More creativity in playground designs such as colors, shapes and mounds.
- Creating flows to the playground:
 - More consideration of sustainability and environmental factors.
 - Community involved design.

When asked what playground trends would look like five years into the future, most respondents reported much the same as the key trends stated above, but that there would be heavier adoption of these trends. However, a few had some interesting thoughts on surfacing becoming play elements on their own and more creative use of technology integration/digitally augmented play.

These same trends have been validated by quantitative playground studies/reports conducted by "Voice of Play," "Inspired Play," "Churchick Recreation," and a study conducted among playground designers in early 2020, by Nathan Schleicher.



PLAY BENEFITS FROM NEW PLAYGROUND TREND DESIGNS:

More Active, Creative and Stimulating

"Investigating the State of Play" qualitative research respondents felt that the state of play today is about encouraging much more free and creative play among children. They further reported that play today is less structured than in the last five to ten years, and that play is actually going back to the play of the past, but is much safer due to the availability and use of better safety surfaces and quality equipment.

Respondents also stated:

- Play is becoming more creative and stimulating for kids as there are more activities and options on the playgrounds.
- Children are being more physically active and running around more (loop play).
- Kids are a bit more aggressive in their play as far as taking additional risks and challenging themselves.
- There is less conflict between children because there are so many options and much more free space:
 - Children are busier in their play and are stimulated versus bored. No one is fighting to get on the swings or slides.

Overall, respondents felt that the state of play has changed to allow kids to be free to be kids, doing what comes naturally. They are seeing the spirit of children freely coming out and seeing pure joy on their faces.





Child Growth & Development

Because of the different play areas for different age groups, respondents felt that younger kids are learning and growing by watching other age groups and aspiring to what the older kids are able to do. And, because playgrounds are more inclusive, they are seeing children of differing ages and cognitive and physical abilities playing together frequently, by doing so, learning social skills and awareness. They are building community while they play.

This is further confirmed by the published 2020 "Voice of Play" survey by IPEMA and the "Voice of Play," which surveyed over 1,000 parents and found that:

- Play is more important than ever before: More than 50% of parents say they value public playgrounds more today than before the pandemic.
- Further, 92% agree that playing on the playground helps children to be inclusive of others who may have different abilities and backgrounds than their own—basically shaping their child's view of equality for all, regardless of race and ability levels.
- Additional positive impacts that parents see from their children playing with other children on public playgrounds include:
 - Improved physical fitness (42%).
 - Less screen time (38%).
 - Confidence boosting (30%).

SOLUTION: HOW SYNTHETIC PLAYGROUND TURF IMPACTS PLAYGROUND EVOLUTION

State of Play: What Makes a Better Play Experience?

"Investigating the State of Play" research respondents also offered the following on what they felt made a better play experience:

- "The safety surfaces, for sure, and the new structures that are available."
- "Shade areas."
- "Running space, open areas that allow for creativity – let kids be free to design their own play."
- "Specific areas (bike tracks, natural areas, educational areas)."
- "Certainly the design of the playground, the bright colors."
- "Elements that require exercise of the body and brain, physical and mental challenges."
- "Something for all ages (not just children, but adults and seniors as well)."

As to why these items made a better play experience, respondents stated that all playground users need a place to disconnect and recharge...a place to relax and just veg out. And that children, specifically, need a place to grow and learn freely—to have more time that is unstructured.

Respondents also ranked a number of elements on a scale of 1–10, as to their importance in making a better play experience. The results show cleanliness of the playground as the leading factor at an average ranking of 9.2, followed closely by the overall appearance and appeal and overall fun factor of the playground, both at 8.7. Strict safety and allergen-free factors ranked lower overall.



When looking at the highest ranked factors of what makes a better play experience, synthetic turf qualifies as the best safety surface solution. The items include, cleanliness, overall appearance and appeal, overall fun factor, ability to have and create socialization spaces and reduced maintenance—easy to maintain. Synthetic turf also qualifies as a top safety surface solution for other ranked items including: natural play elements and strict safety factors, such as, fall height compliance and allergen-free.

Item	Ranking	Item	Ranking
Cleanliness	9.2	Passive Spaces	7.7
Overall Appearance & Appeal	8.7	Safety and Age Appropriate Signage	7.7
Overall Fun Factor	8.7	Active Spaces	7.5
Socialization Spaces	8.2	Natural Play Elements	6.7
Regular Maintenance	8.0	Strict Safety Factors / Such as Fall Height Compliance	6.3
Safe Play Elements that Look Risky	7.8	Allergen-Free	6.2
Design / Elements for All Ages	7.7		

Critical Must Haves & One Thing Making a Big Difference in New Playgrounds

Respondents to the “Investigating the State of Play” research were also asked what were the critical must haves and the *one* thing that made a big difference in their playground redesign. As far as the critical must haves, surfacing was only mentioned once, while other factors such as age appropriate/sensory equipment, standardization/equity across the park system, overall quality, safety and accessibility were stated more frequently.

However, when asked about the *one* thing that made a big difference in their new or refurbished playgrounds, respondents most often felt that the synthetic turf surface was the *one* thing that made the biggest difference, followed by the play equipment. Though this primary research is qualitative in nature, 70% said that synthetic turf was the most important element to their playground design or redesign. 20% of respondents couldn’t state one individual thing that made the biggest difference, but rather that the playground elements were all integrated as a whole. Only 10% said that the safety surface/turf importance falls after the equipment and infrastructure needs are determined.

It’s interesting to note this dichotomy in respondents’ thinking from *before* the playground renovation to *after* the playground renovation. It represents an opportunity for synthetic playground turf manufacturers to educate targets as to the importance of being engaged at the beginning of the playground design process.



ENSURING SYNTHETIC TURF SURFACING IS A CONSIDERATION AT THE START:

Understanding the Customer Journey for a Playground Refurbish or New Build

In order to ensure synthetic turf is a consideration at the start of playground design, there needs to be a deeper understanding of the customer purchase process including key triggers, the research that is undertaken, the length of the process and the target audiences' needs and motivations. Armed with this information, synthetic turf providers can be at the right place at the right time *and* with the right message for key targets and influencers.

To that end, "Investigating the State of Play" research respondents indicated the following time frames from recognizing the need to installation of a new or refurbished playground:

- Typically takes one year.
 - Can take as little as three months if only refurbishing a small area.
 - Or can be as long as two years for larger playgrounds.

They stated that usually the process is slow at the beginning stages, but speeds up and is more aggressive for the later six months. The last six months is when they get into the fine tuning and implementation: final planning and drawings, sign-off and approvals, obtaining permits and then installation.



Surface Decision Timing Across the Customer Journey

As far as *where* the safety surface decision falls within the process:

- Respondents with smaller applications said it is the first thing they look at.
- For those with larger applications, it is normally planned for/budgeted at the beginning of the process as far as ideas and options, but the final decision on safety surface type and brand falls midway through the process.

When asked how long they took to make the safety surface decision (type and brand), the respondents reported that they typically took two to three months. This further illustrates the importance of synthetic turf providers being present at the start of playground design in order to ensure funds are accurately budgeted upfront for the best synthetic turf playground options for their project.

Customer Purchase Process: New or Redesigned Playground



Source: Insights from "Investigating the State of Play" Qualitative Research, ForeverLawn Synthetic Turf, July, 2020





Target Audience Critical Needs

Key messaging to target audiences should, of course, include product features and benefits, but also focus on targets' higher level motivations...what drives them and why they love what they do. These were uncovered in the "Investigating the State of Play" research:

Daycare directors and assistant directors:

Daycare Directors challenges and needs are that they are always looking to make more improvements to their playgrounds; including shade areas, new activity areas, more turf areas, and spaces that are easy to monitor. They need bigger budgets and funding to make these improvements.

What Drives Them: "Help me keep my kids stimulated, safe & happy!"

Park district/school district superintendents:

Larger school systems and park district superintendents have much the same challenges and needs as daycare directors, just on a larger scale. They are also continually looking to improve their parks or playgrounds (including putting greens, more age appropriate areas, more hillsides and mounds) and need bigger budgets to bring their visions to life.

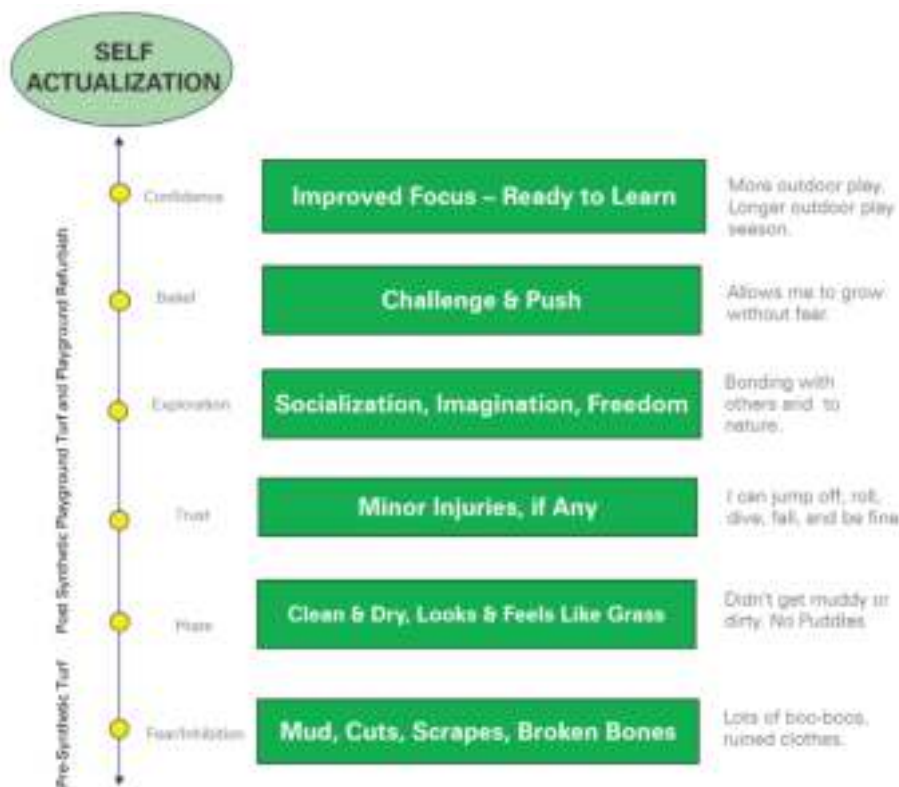
What Drives Them: "My reward is building places and spaces where people want to be. It's a privilege. I'm all about building and serving my community."

There are often many other brand influencers throughout the playground design process. They can include landscape architects, playground designers/firms, engineers, playground equipment manufacturers, and surfacing manufacturers. Final decision makers typically view the various brand influencers as having expertise in their specific areas and as equal partners in their playground design process.

HIDDEN IMPACTS SYNTHETIC PLAYGROUND TURF HAS ON CHILD DEVELOPMENT:

When asked how their new synthetic playground turf changed how children played, observations from daycare, elementary school administrators, and park superintendents included many surprising developmental factors along with expected play factors. They also stated that, "Kids don't process these benefits...they don't think about it like we do. They are just having much more FUN!"

1. "Infants and children feel safer, so they are free to explore more."
 - a. "There is nothing to trip on (even surface), choke on or get scratches and scrapes from."
 - b. "There are less injuries, scratches and scrapes."
2. "Extends the time that kids are able to be outside – which is much better for learning and focus."
3. "Allows kids to get back to nature, looks real, allows them to disconnect from the world, which fosters creativity."
 - a. "Provides sensory benefits – look, touch and feel."
4. "More interaction and physical activity/more to do: They sit on it and play, roll around more, jump and play on the surface and the mounds, dive onto the turf, they run around a lot more."
 - a. "The mounds are fantastic and allow for imaginative play. The kids love them."
5. "It's cleaner and more inviting."
6. "Kids are less fearful, more confident."
7. "They are happier, more excited."
8. "Increases free play, imaginative play."
9. "Adds to play flexibility (sprinklers, water balloon fights, etc.)."



SYNTHETIC PLAYGROUND TURF'S EXTENDED IMPACT ON THE COMMUNITY AND ITS ECONOMY:

Many respondents reported positive community and economic impacts that their playgrounds utilizing synthetic turf had:

Community:

- "All ages, from adults to seniors and different aged children, are playing together and getting to know each other."
- "Community use of our parks and playgrounds is exploding."
- "Because our playgrounds are more inviting, safer, and cleaner, they are more of a destination."
- "We've seen profound effects on how the community uses our playgrounds outside of the school day."

Economic:

- "Everyone sees the evidence that their tax dollars are being spent to benefit the entire community."
- "Parents are enamored with it, it helps us sell our daycare program."
- "Our community park and school playgrounds have such aesthetic appeal...it's even driving new and existing home sales."

Further, the utilization of synthetic turf in sports fields, playgrounds and play areas is projected to nearly double by 2025, as reported in the May 2020 issue of National Parks and Recreation Magazine. This growth will positively impact the local community, synthetic turf dealers, and installers as well.



CONCLUSION

While there are many factors that impact the improvement of America's play spaces, synthetic playground turf is uniquely positioned to be a key factor, actually the foundation, for maximizing the play experience.

Synthetic playground turf:

- Meets the top ranking factors of what makes a better play experience as previously mentioned.
- **Features natural shock absorption and padding options that offer the safest fall specifications compared to other surfaces.**
- There are no holes or uneven surfaces, so it creates play areas that are universally accessible and inclusive.
- Is part of the play experience, it's a play element on its own.
- **Is low maintenance, easy to clean, and maintain.**
- Has no allergens and is not prone to mildew and bacteria.
- Further, some offer static reduction and antimicrobial agents for added protection and cleanliness.
- Has superior drainage systems and durability...there are no more muddy, unsafe conditions—it is always ready for play.
- **Increases outdoor and free play...aiding in children's social, physical, and cognitive development.**
 - Lets kids be outdoors more after inclement weather and extends the outdoor play season.
 - Allows kids the freedom to be kids, building confidence because they are free from fear of injury.
- Has surprising community and economic benefits.

"It's a natural draw."

– Park District Superintendent

"If we didn't have the synthetic turf safety surface, the kids wouldn't be outside as much. That helps them focus themselves for everything else—it has a great impact on the kids as well as the parents."

– Park District Superintendent

"You'll never see a kid sit down and play on any other surface like they do on synthetic turf...be content just sitting there, touching the surface, rolling on it, tackling their friends."

– Park District Superintendent

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