Today's youth, tomorrow's internet

A Nominet Digital Futures Report

NOMINET

Contents

Foreword

The UK's young people know the internet is the future, but how do they really feel about it?

For more than 30 years the internet has had a growing presence in the lives of everyone in the UK. Its impact has been profound, touching on practically all elements of our existence. That's especially true for young people, who have grown up alongside online technology and whose lives will continue to be shaped by it for decades to come.

At Nominet, part of our mission is to contribute to a digital future that is more connected, inclusive and secure. Young people are the future business owners and leaders the UK will rely on, so understanding their relationship with the internet is crucial. That's why we commissioned this research – to find out how they feel about the internet today, how they see it affecting their lives and what hopes they have for the future.

But it's not all about waxing lyrical on how the country should prepare for our digital future. Actions speak louder than words, which is why we're committed to an ever-growing programme of projects to enhance the UK's digital readiness and prepare it for the future. And it's our partnerships with leading youth organisations, from the from the Scouts and Samaritans to The Prince's Trust, Micro:bit, Digital Leaders and the Learning Foundation, that give us invaluable insights into young people of today and their relationship with all things digital.

Today's youth are fully immersed in a digital world. But how do they really feel about it and how exactly will they navigate the digital world of tomorrow? We all know that the subject matter of this report is a controversial one. Young people are dealing with, and will continue to face very mature issues in the digital world, not least online bullying, anxiety and fake news, which continue to generate negative attention. But the internet, social media platforms and the successors of these technologies are our future – they bring so many benefits which consumers and businesses alike depend upon. We wanted to delve into these topics to draw out the positive aspects of having to overcome such challenges to help build a safer and more stable digital future.

The level of maturity, confidence and optimism for the future of the internet shown by young people is encouraging. By first acknowledging there are issues and understanding that we need to make behavioural and legislative changes, young Brits are realistic in their vision for the future. And we should listen to them. Their willingness for technology innovation and drive to stamp out issues of anxiety, cyber security and negative online conduct should be the catalyst and motivation we need to overcome any challenge and build a safer and more secure digital future.

– Russell Haworth, CEO, Nominet

About the research

The Digital Futures project aims to track sentiment on how connected, included and secure we are as technology changes the world around us.

The objective of this report was to collect and analyse a large enough dataset to make valid conclusions into the opinions, behaviours and mindset of young adults (aged 18–24) and children (aged 11–17) with regards to the internet and its future. The results have been weighted to be representative of the national population in the UK.

Nominet commissioned PDS (Populus Data Solutions) to survey a sample of 2,080 UK adults, including 505 aged 18–24, and a sample of 1,032 UK children aged 11–17 on several key themes including the impact of technology, digital ability, social media and inclusivity and the workplace. The research was conducted online between 30th January and 6th of February 2019.

Executive summary

The findings paint an interesting picture that can be split into several areas. But two key themes emerged strongly. Firstly, today's youth are very optimistic about the internet and its future – but they are fully aware of its limitations and downfalls. Secondly, they're committed to building a safer, more stable and secure digital future.

- Young people are **optimistic yet prudent** about the value technology brings to the world

- More than three-quarters of young people say **technology has helped** in all areas of their lives, **but they recognise the negative impacts** it can have in areas such as mental health, bullying and fake news

- They have **clear views** on how to overcome some of the digital challenges we face, from s**trong appetite for digital passports** for online activity and **limiting access to smartphones in schools**, to prioritising consistent **reliable connectivity over ever increasing speeds**

Optimistic yet proceeding with caution

It's clear that young people in the UK today are optimistic about the internet and know that it will be key for the future.

The 18–24 year olds surveyed were mostly in agreement that technology has played a positive role in communication and learning.
They acknowledge it allows people of all ages and backgrounds to communicate with each other (77%), learn new things (74%), and open minds to other points of view (56%).
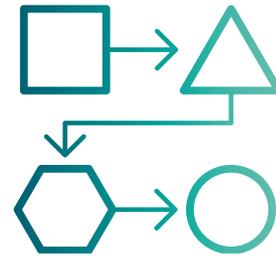
Almost half of 18–24 year olds are excited about benefits AI can bring to society. But, can also see limitations: e.g. they are less glowing about it being used to reduce crime.

Do you feel that technology (such as the internet) has been/will be good for reducing crime?

	Now	In 5 years
11–17 year olds	18%	28%
18–24 year olds	20%	23%
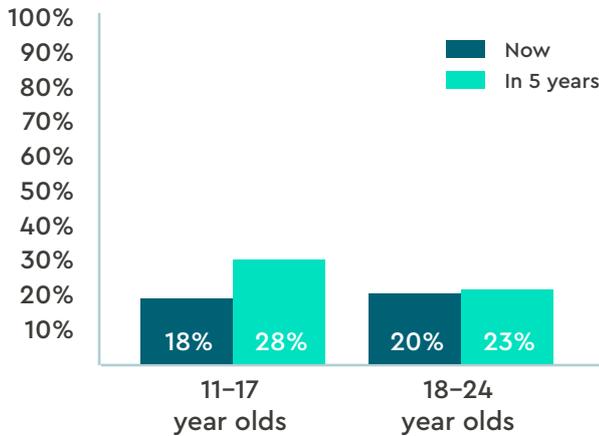
Score: 0 to 10, where 10 is very good and 0 very bad. Showing % giving a score of 8, 9 or 10

Do you feel that technology (such as the internet and mobile phones) has been/will be good for you personally?

|	Now	In 5 years
11–17 year olds	78%	75%
18–24 year olds	58%	46%
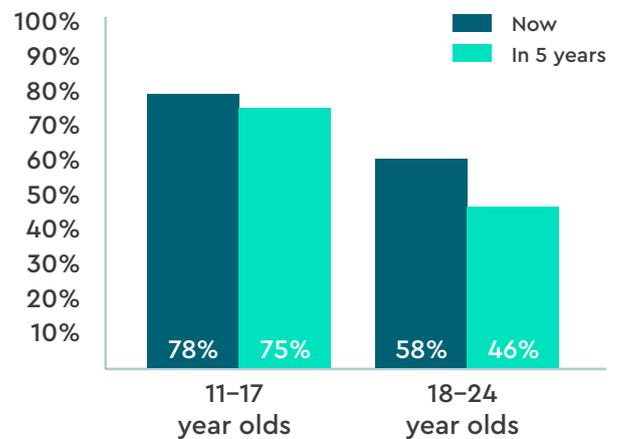
Score: 0 to 10, where 10 is very good and 0 very bad. Showing % giving a score of 8, 9 or 10
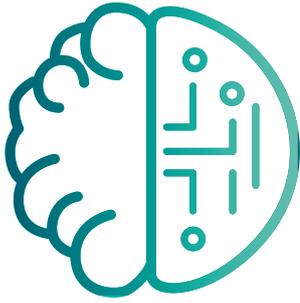
Young people want tech to be developed responsibly and safely. Nearly a third of 18–24 year olds think tech that makes decisions in place of people should be designed in an ethical and socially responsible way and more than half (56%) don't use technology until they are sure it's reliable.
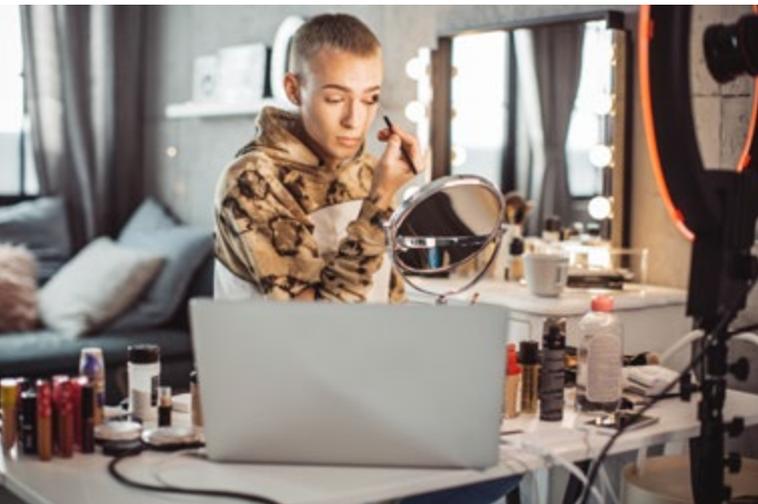
In which of these has technology played a positive/negative role?

Negative   Positive

Allowing people of all ages and backgrounds to communicate with each other

15%

77%

Allowing people of all ages and backgrounds the ability to learn new things

8%

74%

Opening our minds to other people's point of view

16%

54%

Allowing us to get more done in our daily lives

24%

48%

Giving me access to self-help content more easily rather than speaking to a professional

10%

54%

0% 20% 40% 60% 80% 100%

Overall attitudes to technology

The internet isn't for people like me

Legend: Agree, Disagree

11–17 year olds: 4% Agree, 88% Disagree
18–24 year olds: 5% Agree, 80% Disagree
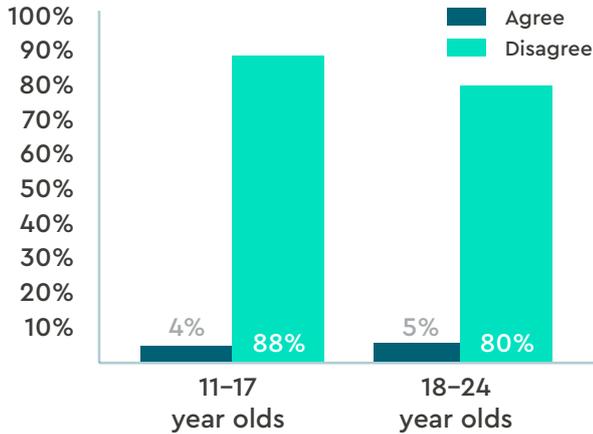
Technology such as internet and mobile phones helps me in just about all areas of my life

Legend: Agree, Disagree

11–17 year olds: 81% Agree, 5% Disagree
18–24 year olds: 76% Agree, 6% Disagree

Technology is a force for good

Legend: Agree, Disagree

11–17 year olds: 75% Agree, 3% Disagree
18–24 year olds: 56% Agree, 6% Disagree
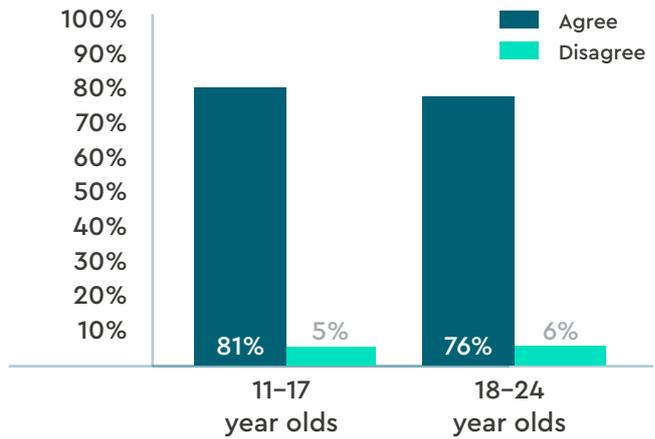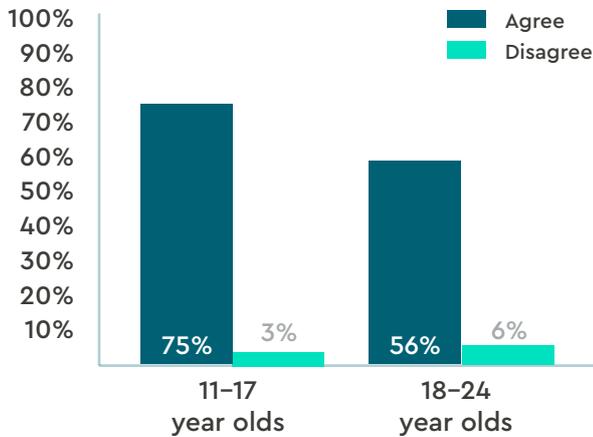
Technology will create new job opportunities for me

Legend: Agree, Disagree

11–17 year olds: 69% Agree, 6% Disagree
18–24 year olds: 53% Agree, 14% Disagree
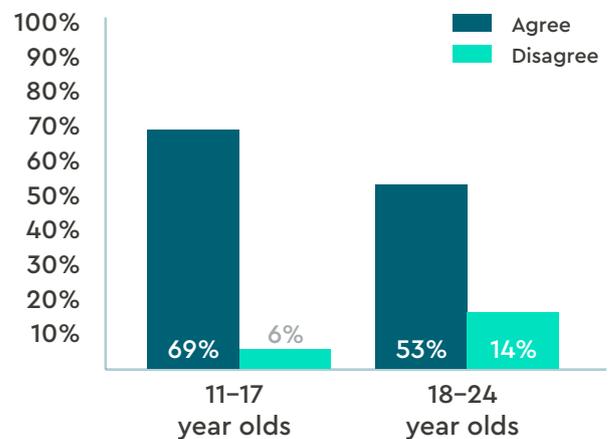
Young people – especially 11–17 year olds – are also extremely positive when it comes to seeing the opportunities and benefits the internet brings. The majority (78% of 11–17s and 58% of 18–24s) think that the internet has been good for them personally. 81% and 76% of the same respective age groups agree that technology like the internet and mobile phones helps them in all areas of their lives, while 75% and 56% respectively think technology is a force for good.

7/10

11–17 year olds believe technology will create job opportunities for them

They are also confident in the possibilities future tech will enable – almost half of 18–24 year olds believe that in the future, computers will be able to make better decisions than humans. The same amount is also excited about the potential benefits AI can bring to society.

However, we should not mistake excitement for naivety. Today's youth are well aware of the internet's limitations and have a realistic view of the issues it has created. Chief among these concerns are cyber bullying, fake news and cyber security. Around two-thirds of young people know people who have experienced being bullied over the internet, with 16% of 18–24 year olds suffering from anxiety or mental health issues as a result of social media. Three quarters of 18–24 year olds think social media is driving fake news, while just over that (78%) think fake news changes how people vote. On the topic of their own security, more than six in ten 18–24s worry their personal information will get stolen if share too much online.

Around two-thirds of young people know people who have experienced being bullied over the internet

- **Online bullying:** 69% of 11–17 year olds and 65% of 18–24 year olds know people who have been bullied online

- **Mental health issues:** 16% of 18–24 year olds have suffered from anxiety or mental health issues as a result of social media

- **Surveillance concerns:** 50% of 18–24 year olds believe that the government is watching everything we do online

- **Fake news:** 74% of 18–24 year olds say social media is driving fake news

- **Data security worries:** 61% of 18–24 year olds worry people will steal their information if they share too much online

- **Bad for manners:** Only 7% of 18–24 year olds believe that tech has played a positive role in improving people's manners

- **Creating divisions:** 55% of 18–24 year olds agree that social media is creating more social and political divides in society than not

Overcoming challenges for a safer future

It's clear that technology and the internet, invariably via social media and fake news, are forcing young people to face mature issues, such as online bullying. As noted in the previous section, our research shows that the majority of 18–24 year olds (65%) and 11–17 year olds (69%) know someone who has been bullied online, and around four in ten of both age groups feel under pressure to impress friends and followers online.

As a result, young people are naturally having to address these challenges and are finding means to overcome them. By first acknowledging there is an issue, they can understand their behavioural needs and changes they might need to make. Our findings show an awareness of needing to protect themselves online, with almost four in ten 11–17 year olds and almost half of 18–24 year olds updating their privacy settings in the past year, and almost two in ten 11–17 year olds and three in ten 18–24 year olds claiming they've left at least one social media site in the same time period. They also show great sensitivity when it comes to not wanting to offend or cause offence to others online, especially with regards to gaining permissions before posting. What's encouraging is that young people are taking action to help remedy concerns they have about their own online behaviour as well as mitigating the effects of the behaviour of others.

4/10 young people feel pressure to impress online

Half of young people have left a social media platform in the past year

Which of the following have you done in the last year?

■ 11–17 year olds   ■ 18–24 year olds

I have upset a friend because of what I have posted on social media:

9%

6%

I have posted pictures of other people without permission:

7%

6%

I have posted pictures of children without permission:

2%

1%

0% 20% 40% 60% 80% 100%
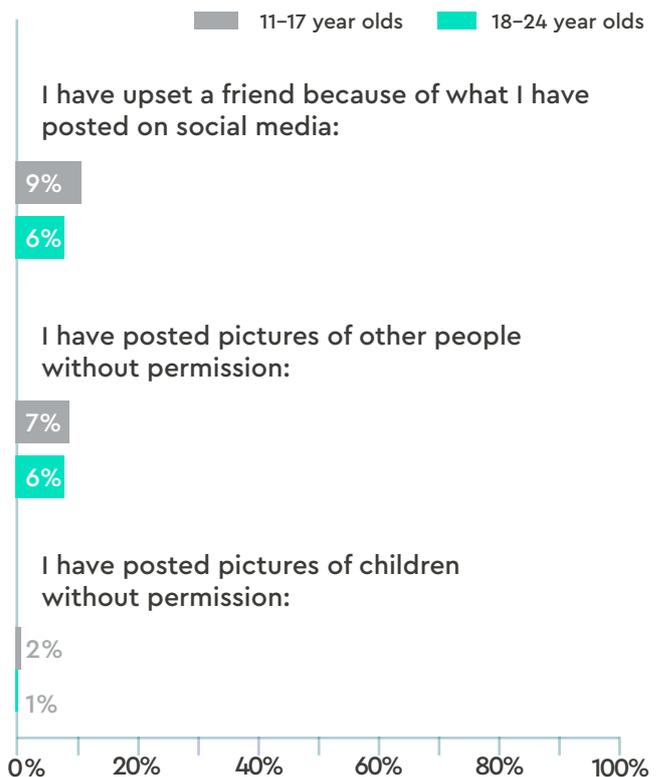
Today's youth are also very keen for there to be controls and regulations in place for tackling such issues. The majority of (60% of 18–24 year olds) think there should be a national policy on limiting access to smartphones/social media in schools. This can perhaps be attributed to their concerns over the negative affect of social media and messaging apps on themselves and those still at school.


Do you agree or disagree that:

- There should be a clear **national policy on limiting access to smartphones/social media in schools**:
18–24 year olds: agree: 60%, disagree: 14%

- **Lessons about how to use social media**, messaging apps, and behaving properly online should be in the national curriculum:
18–24 year olds agree: 68%, disagree: 15%

- **Social media and messaging apps negatively affect children:**
18–24 year olds agree: 56%, disagree: 13%

Young people are excited to embrace future technology, however, they're keen for there to be controls so that it's implemented as safely and securely as possible and managed for a wider benefit. Perhaps as a result of the very public chaos at Gatwick airport in December 2018, they'd like to see licences in place for drones. They're also forward thinking when it comes to identification and authentication online, with an appetite for a single digital passport with which to access all online services.


Overall, how willing are you to have to have a licence to fly and own a drone?
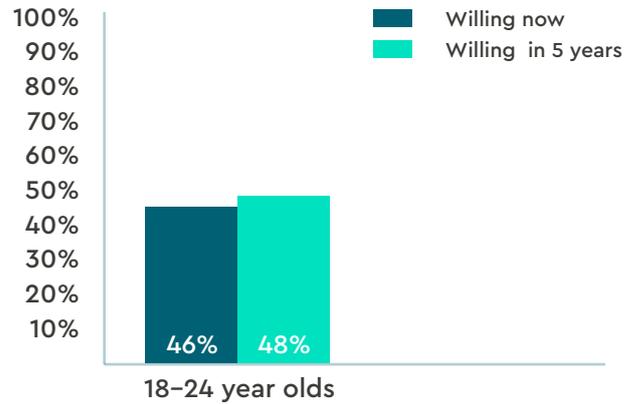
Legend: Willing now / Willing in 5 years

- 18–24 year olds: 46% / 48%

*Score: 0 to 10, where 10 is completely willing and 0 completely unwilling. Showing % giving a score of 8, 9 or 10

Do you agree or disagree that it should be illegal to fly a drone in the UK that has not been registered with a central body?

Legend: Agree / Disagree

- 18–24 year olds: 56% / 13%
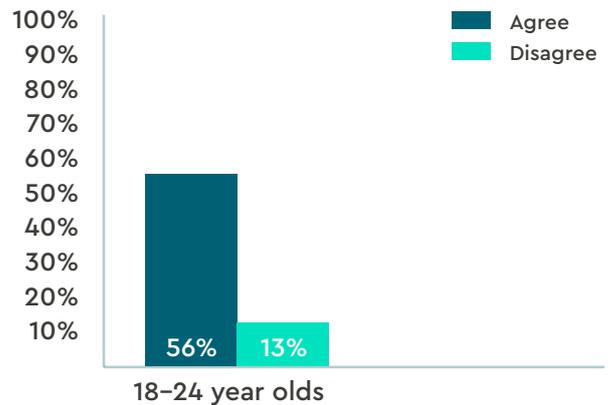
Overall, how willing are you to have to have a digital ID/passport to access any online services?

Legend: Now / In 5 years

- 11–17 year olds: 37% / 44%
- 18–24 year olds: 20% / 26%
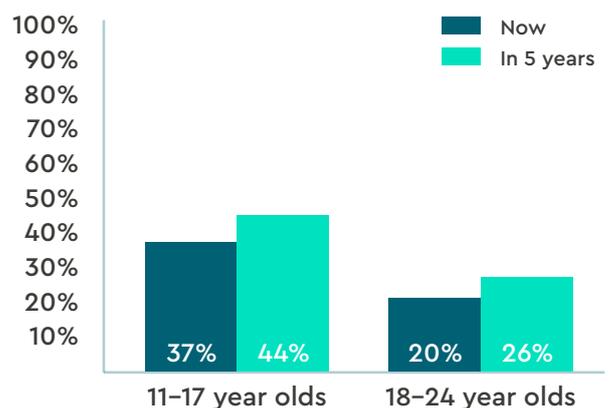
Digital abilities and willingness

Young people are generally more capable than adults in most areas of technology. For example, more than three-quarters of young people rate connecting to wi-fi or uploading a video clip, as easy – a greater proportion than adults in each category.

Young people also tend to be more open to the idea of tech-enabled tasks taking the place of human intervention, such as riding in a driverless car or having a medical procedure performed by a robot. Willingness to try new and emerging tech varies amongst the younger age groups, however, and 11–17 year olds are most willing to talk to a machine to make it do something (61%) – most likely due to growing up alongside digital assistants over the last few years.

The youngest age group are also the most enthusiastic about having home deliveries made to the home by drones (38%), perhaps because they are less exposed to the negative press around the subject.
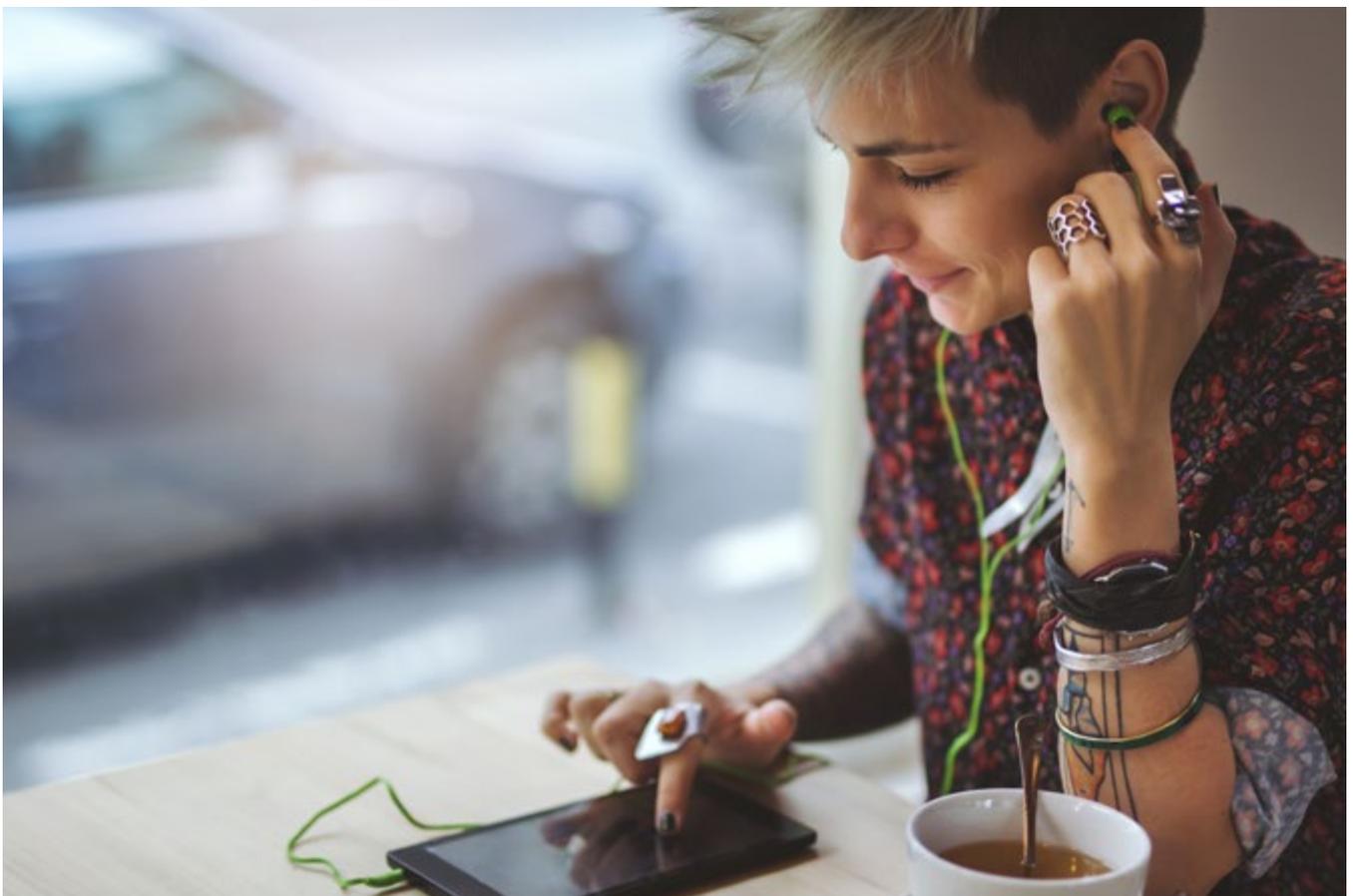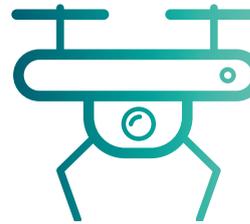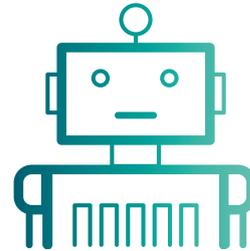
Scepticism around future tech

However, there is still a good deal of scepticism. In some cases, such as drone deliveries and using social media as the main way to contact friends and family, willingness is decreasing over time – perhaps due to the increased scrutiny in these areas in recent years.

How willing are you to take a ride in driverless cars?
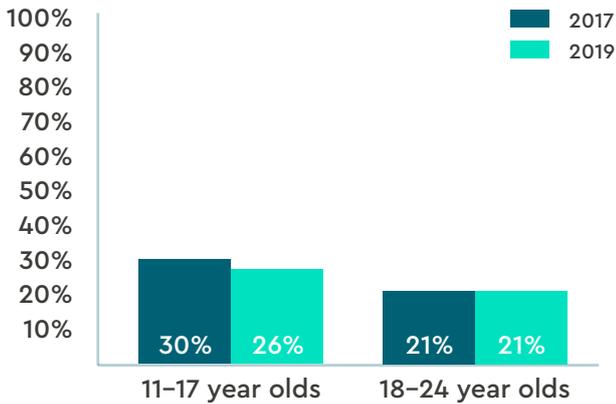
2017
2019

	11–17 year olds		18–24 year olds	
	30%	26%	21%	21%

*Score: 0 to 10, where 10 is completely willing and 0 completely unwilling. Showing % giving a score of 8, 9 or 10

How willing are you to have a medical operation performed by a robot?

2017
2019

	11–17 year olds		18–24 year olds	
	13%	14%	12%	17%
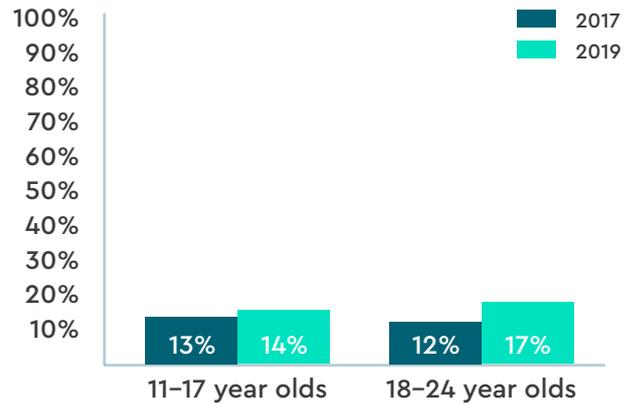
How willing are you to have home deliveries by drones?

2017
2019

	11–17 year olds		18–24 year olds	
	42%	38%	32%	28%
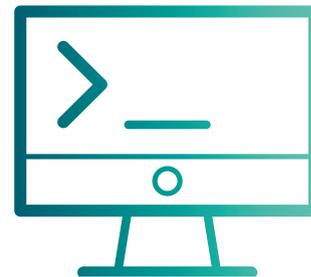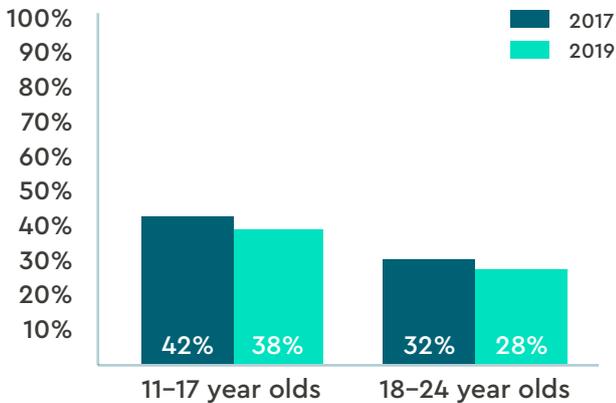
10% of 11–17 year olds and 13% of 18–24 year olds say building a website from scratch is easy

Connectivity needs

Being able to do anything in the digital world depends not only on willingness and know-how, but also connectivity. On this point, young people demand more from and are generally less satisfied with their internet connection – both at home and on mobile – than adults. Close to one in five 18–24 year olds think their home internet connection is too slow for their household's needs, while the vast majority (89%) of 18–24 year olds experienced issues with broadband reliability in the last year, compared with 79% of adults.

Only two in five (41%) say their connection can easily cope with their household's needs.

Less than half of 18–24 year olds say their internet connection can cope with their needs

Do you think your home internet connection (wi-fi) is...?

Adults   **18–24 year olds**

Easily able to cope with all of my and my household's needs

46%

41%

Adequate for my and my household's needs

40%

39%

A bit too slow for my and my and my household's needs

11%

16%

Way too slow for my and my household's needs

3%

4%

0%   20%   40%   60%   80%   100%

More than half of 18–24 year olds would prioritise a reliable internet connection over a faster one
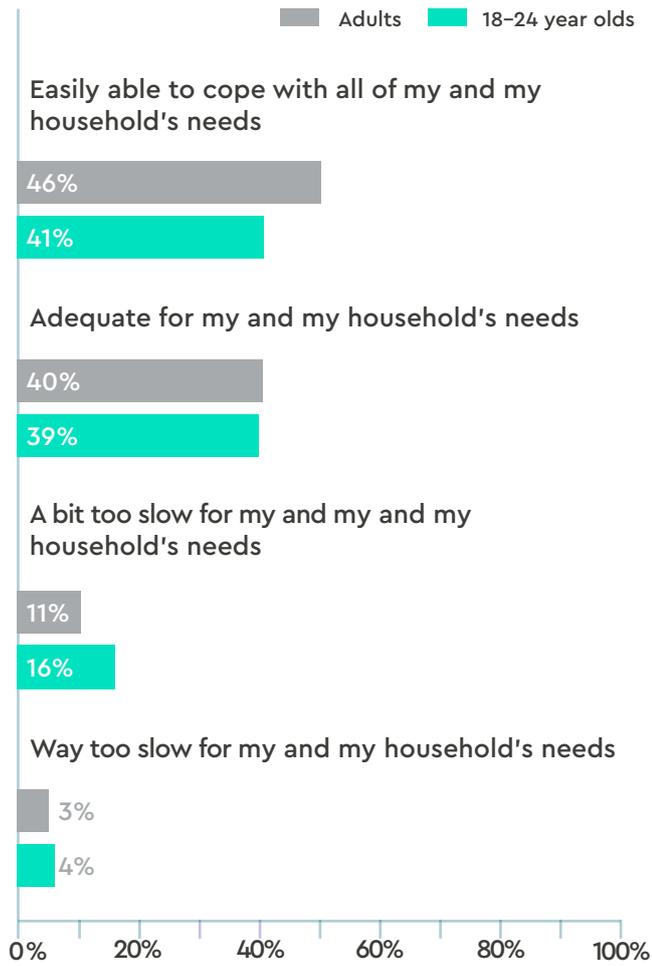

More than a quarter of young people go as far to say that the quality and speed of local internet connections has impacted the community, and a fifth admit that they refrain from using certain online services as they worry about how unreliable or low speed the internet connection is. Unreliability of connections has in many cases led to missed social and work/school opportunities. 17% of 18–24s say they or a member of their household has missed out on social opportunities due to an unreliable connection (vs 9% of adults).

If forced to choose between speed and stability, more than half of 18–24 year olds would prioritise a reliable internet connection over a faster one, and the same amount agree that the industry should focus on consistent geographic coverage over faster but geographically limited speeds.
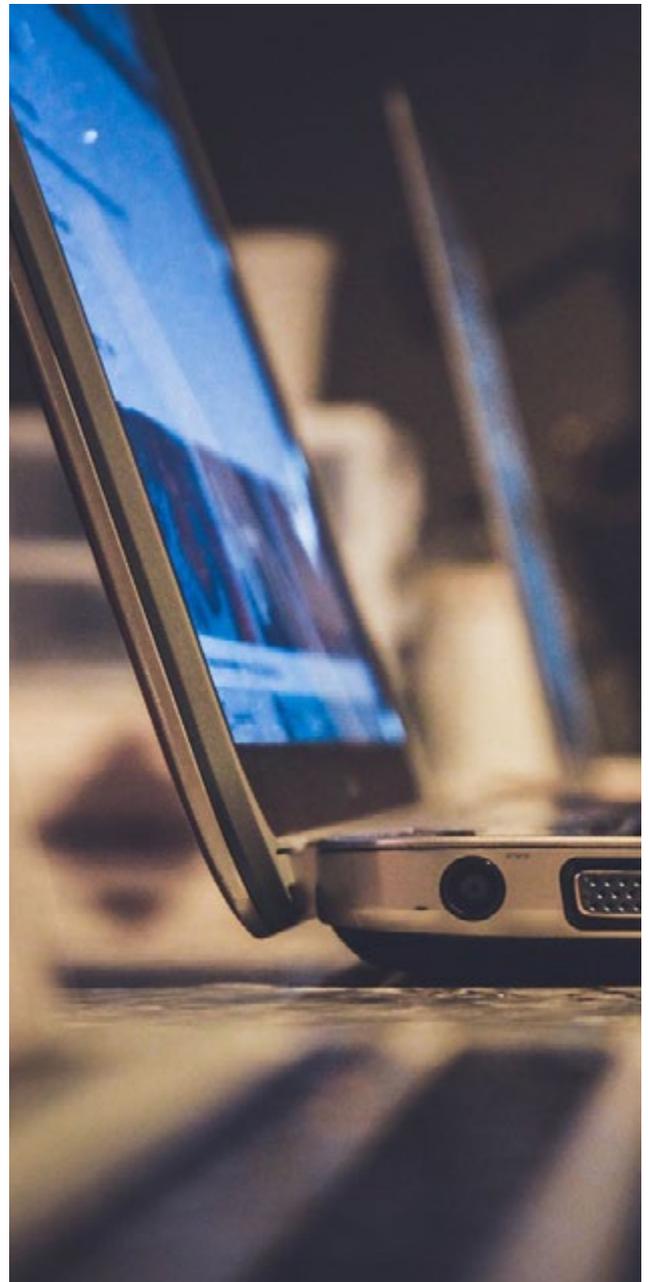
Cyber security

Young people trust themselves more than the government or technology companies, when it comes to their online safety. 40% of 18–24 year olds trust the government to keep them safe, and 45% trust tech companies with their security. But a far greater proportion – 76% – think they know enough to keep themselves safe. What's more, more 18–24 year olds think tech companies behave unethically (47%) than they think they act ethically (41%).

There is a degree of complacency, however, around cyber security. 18–24 year olds understand some aspects of cyber security well (changing passwords, changing privacy settings etc.) but they should be doing a lot more when it comes to taking advantage of taking security precautions such as only using secure wi-fi for online transactions.

And, despite the fact that over a fifth of 18–24 year olds have been a victim of hacking or data theft, almost half think that being a victim in the next year is either not likely or 'will definitely not happen'. Best practices, such as using secure wi-fi, using additional security software or using two-factor authentication are also not being used by the majority of young people, demonstrating a lot more needs to be done to educate them.
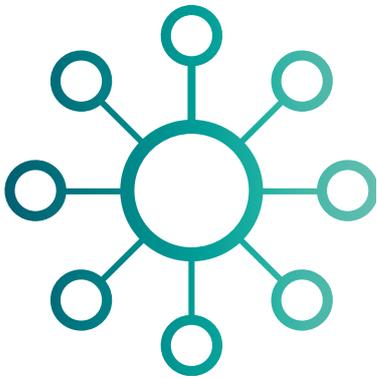
Only

4/10

18–24 year olds trust the government to keep them safe online

Tips for staying safe online:

Are you doing the following?

- Taking advantage of secure wi-fi for online transactions: 44%
- Installing additional security software: 35%
- Using two-factor authentication: 32%

- **22% of 18–24s have been a victim of an online attack. But 10% say they will 'definitely not' be a victim in future and 34% say it's unlikely**

Expert Opinion

"The BBC micro:bit has the potential to equip the next generation with the skills they need to build and use the internet and technology of the future – and insight into young people's sentiment about both are hugely valuable. This report provides us with a great viewpoint around young people's appetite to restrict tech as well as develop it and what's key is that we have a future hiring pool of young diverse talent to help drive progress."

Gareth Stockdale
CEO, Micro:bit Educational Foundation

"It's great to see that this report has engaged directly with young people, to gather their thoughts and experience of interacting with technology and the internet. We are all living more digitally than ever before and we know this brings both benefits and challenges – it's therefore important to understand the impact it has on younger generations, who can be more vulnerable. Our recent partnership with Nominet to develop self-help tools and a digital dashboard to better manage calls is a vital piece of the puzzle to help support those in need now and in the future."

Ruth Sutherland
CEO, Samaritans

"We believe that helping young people develop their digital skills in a responsible, fun and safe way is a key to preparing them for a brighter future and that's why we are updating our Digital Citizen badge with Nominet. The four-stage programme will encourage young people to perform a number of tasks designed to develop and nurture their digital skills. Throughout the journey also want make sure we educate them on the potential risks of being online and participants are encouraged to think about how to stay safe for each activity."

"It's important to educate young people about the benefits of everything digital and how it can enrich their lives. However, we also have to be very clear about the dangers involved and how best to navigate these issues. It's a warts and all approach – young people need to know that the internet is not a totally safe haven they can escape to, forewarned is very much forearmed. It's by partnering with organisations such as Nominet, that we can make a real difference to young people's lives and give them digital skills for life"

Simon Carter
Scouts

"We will never give up on a young person who wants to live, learn and earn more. To ensure we do this we must embrace the changing world of technology. This report gives some valuable insights into what is and isn't of interest among young people as well as their hopes and concerns around tech for their future. By listening to and working with young people we can all ensure we keep people safe online while harnessing the incredible opportunities technology can bring. With Nominet's commitment to help transform our own online services we can support many more young people in ways that we would not have envisaged 12 months ago."

Ian Jeffers
Deputy CEO, Prince's Trust

"Working alongside Nominet, our joint vision via Digital Access for All, is to get equal access for all children and young people in the UK to digital and the benefits it provides. An estimated one million children and young people and their families still don't have adequate access to a device or connectivity at home. Digital exclusion can lead to poorer health outcomes and a lower life expectancy, increased loneliness, social isolation, and less access to jobs and education. It can mean paying more for essentials, financial exclusion and an increased risk of falling into poverty. It's crucial to build a digital future that is open to all, but we must also ensure that this future is a safe and secure one. Part of our mission is to educate about the negative experiences that often happen online and how to overcome or, better still, prevent these, and this report helps provide a focus and generate discussion on these topics."

Paul Finnis
CEO, Learning Foundation

Conclusion

Today it's clear that we'd do well to learn from young people to help shape a safer, more secure and stable digital tomorrow. On the whole, they appear to have a considerably healthy approach to all things tech and are committed to making continual adjustments and changes to overcome challenges they face in the digital world. However, despite a general excitement about technology of today and the future, they're clear appropriate controls must be in place.

Our Digital Futures research sheds light on the myriad of risks associated with an online world. There are always going to be dangers, and new threats emerge every day. It's only by anticipating and addressing these challenges, taking on board young people's views and experiences, and collaborating with organisations that have access to and experience of working with the youth of today, that we'll be able to achieve our mission of forging a safer internet that improves connectivity, security and inclusivity online for a vibrant digital future.

– Russell Haworth, CEO, Nominet
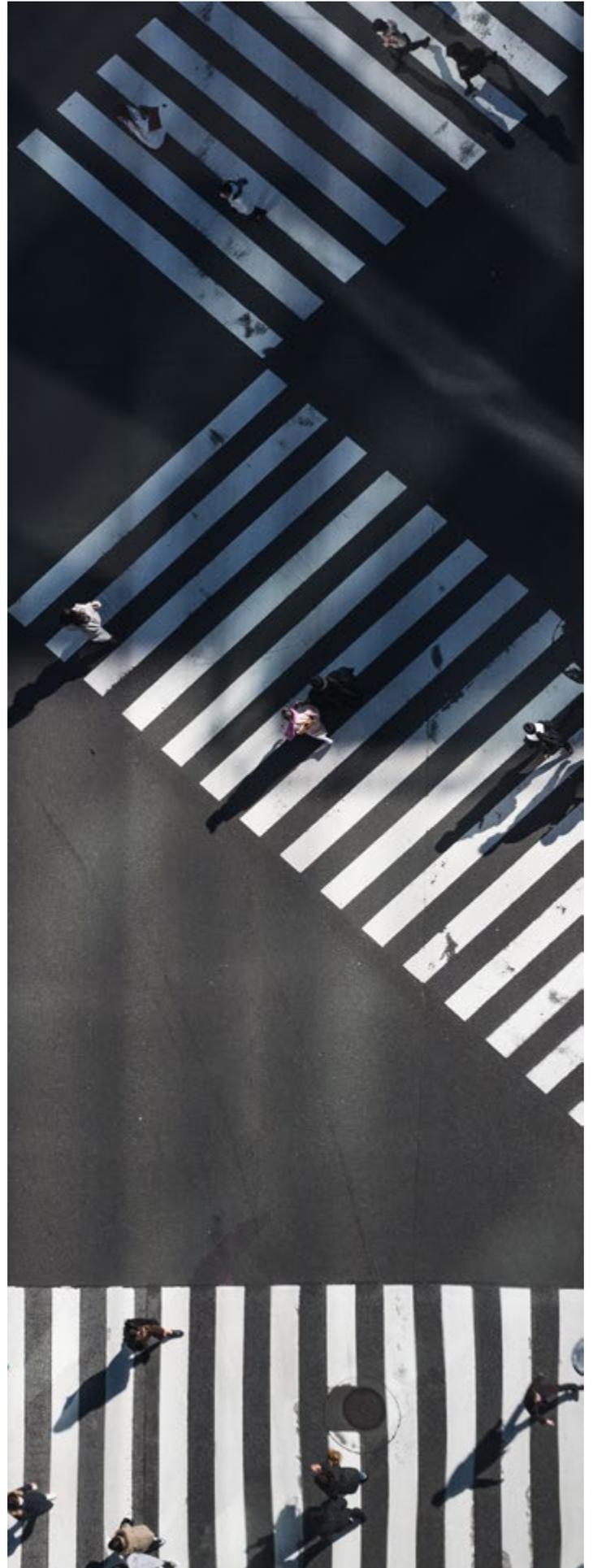
About Nominet

Nominet is driven by a commitment to use technology to improve connectivity, security and inclusivity online. For over 20 years, Nominet has run the .UK internet infrastructure, developing an expertise in the Domain Name System (DNS) that now underpins sophisticated threat monitoring, detection, prevention and analytics used by governments and enterprises to mitigate cyber threats.

The company provides registry services for top level domains and is working to apply its expertise to a range of emerging technologies, including autonomous vehicles, and new tools to support dynamic spectrum management to help meet the increasing demand on spectrum bandwidth, not least for 5G.

As a profit with a purpose company, Nominet supports initiatives that contribute to a vibrant digital future and has donated over £47 million to tech for good causes since 2008, benefitting more than 10 million people.

Find out more at nominet.uk

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