## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive summary</td>
<td>1</td>
</tr>
<tr>
<td>1 Introduction</td>
<td>3</td>
</tr>
<tr>
<td>2 Access</td>
<td>5</td>
</tr>
<tr>
<td>3 Understand and create</td>
<td>13</td>
</tr>
<tr>
<td>4 Learning</td>
<td>28</td>
</tr>
<tr>
<td>5 Media attitudes and behaviours</td>
<td>31</td>
</tr>
</tbody>
</table>

1. **Introduction**
   - Use, volume of use and breadth of use of the platforms
   - Reasons for non-take-up of services
   - Intention to get services

2. **Access**
   - Use, volume of use and breadth of use of the platforms
   - Reasons for non-take-up of services
   - Intention to get services

3. **Understand and create**
   - Interest in, and awareness of, digital features
   - Competence in using features
   - Creative and interactive experience
   - Knowledge of funding and regulation
   - Trust in content
   - Safety and security
   - The extent and level of concerns

4. **Learning**
   - Experience of and preference for learning
Executive summary

This report is designed to give an accessible overview of media literacy among young adults aged 16-24 in the UK. The aim of the report is to support people working in this area to develop and promote media literacy among this group. It is based on a much larger programme of research – Ofcom’s Media Literacy Audits, which were published in 2008.

Access

Compared to the general adult population, young adults are more likely to live in households with digital television and the internet, and to regularly use new media devices such as mobile phones, MP3 players and games consoles. By contrast, regular use of more traditional media, such as television and radio, is below the level for adults as a whole.

Media preferences and use

Developments in digital technology have had a significant impact on the media preferences of young adults; young adults are more likely to say they would miss mobile phones, the internet and MP3 players than adults as a whole and young adults are much more likely than adults as a whole to use more than one media device at the same time.

Overall, young adults are more likely to be interested in, and confident using, the services and functions available through digital television, the internet and mobile phones than are all adults.

Funding and regulation

Compared to adults as a whole, young adults are relatively unaware of how television programmes and radio stations are funded and whether they are regulated. In addition, relatively few young adults are aware of the 9pm television watershed.

Despite being more frequent and more advanced users of the internet, young adults are less aware of how search engines and the BBC website are funded, and do not have a clear idea as to whether internet content is regulated.

Focus on the internet

As well as being more likely to have access to the internet at home, young adults are using the internet for a wider variety of functions and for longer in a typical week, compared to adults as a whole.

Over half of young adult internet users have set up a social networking site profile, and most of these have a profile on more than one site. Half have privacy settings which restrict who can view their profiles.

Although use of the internet, and confidence in using services and functions, is higher for young adults, interest in and confidence using internet security tools is at the same level as for all adult internet users.

1 http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_emg08/ 
   http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_childrens08/ 
   http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_adult08/
Most young adults who use the internet are very confident finding what they want online and using the creative elements available to them online. A minority have the same degree of confidence in being able to tell whether a website is truthful and reliable.

Young adults are less likely to make any kind of judgement about a website before entering personal details, less likely to have concerns about entering personal details online, and just over a fifth do not make checks before using new websites.

Within the young adult population, it is the attitudes and behaviours of the youngest adults – those aged 16-19 – that are most striking. These youngest adults are the most likely to share information and download content from the internet, at the same time as being less likely to make any checks or judgements, and more likely to believe that the internet is regulated.

**Learning**

Experience of learning about digital technology through classes or any other type of training is considerably more common among young adults aged 16-24 than among adults as a whole. Young adults also have a greater appetite for more learning; two in five young adults are interested in learning more about the aspects of digital technology asked about in the research, compared to one in three across the general adult population.

Young adults prefer to learn about using digital technology by asking friends or family, through trial and error and by reading the manual.
Section 1

Introduction

1.1 Background

Media literacy enables individuals to have the skills, knowledge and understanding they need to make full use of the opportunities presented by both traditional and new communications services. Media literacy helps people to protect themselves and their families from the potential risks associated with services.

Ofcom’s definition of media literacy, developed after consultation with stakeholders, is:

\[
\text{‘the ability to access, understand and create communications in a variety of contexts’}. 
\]

The promotion of media literacy is a responsibility placed on Ofcom by Section 11 of the Communications Act 2003, and Ofcom’s work to promote media literacy is intended:

- to give people the opportunity and motivation to develop competence and confidence to participate in communications technology and digital society; and
- to inform and empower people to manage their own media activity (both consumption and creation).

This report is designed to give an accessible overview of media literacy among young adults aged 16-24 in the UK. The aim of the report is to support people working in this area to develop and promote media literacy among this group. It is based on a much larger programme of research – Ofcom’s Media Literacy Audits, which were published in 2008\(^2\).

The key objectives of the audits are:

- to provide a rich picture of the different elements of media literacy across the key platforms of television, radio, the internet and mobile phones; and
- to identify emerging issues and skills gaps that will help to target both Ofcom’s and stakeholders’ resources for the promotion of media literacy.

\(^2\) [http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_emg08/](http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_emg08/)  
[http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_childrens08/](http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_childrens08/)  
[http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_adult08/](http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_adult08/)
1.2 What we mean by media literacy

In order to monitor media literacy through research we used the following measures as proxies for some of the key areas of media literacy (see box below).

**Access**
- Use, volume of use and breadth of use of the platforms
- Reasons for non-take-up of services

**Understand and create**
- Interest in, and awareness of, the digital features of the various media platforms
- Competence in using the features available on each platform
- Knowledge of and competence in using content controls
- The ability of individual users to create their own content
- The ability of users to interact with the medium or with other users
- Knowledge of how elements of each media platform are funded
- Knowledge of regulation
- Trust in internet sites
- The extent and level of concerns for each platform

1.3 Research methodology and analysis

Ofcom’s Adult Media Literacy Audit is a quantitative survey that involved conducting in-home, face-to-face interviews with 2905 adults aged 16 and over throughout the UK. Fieldwork took place from October to December 2007. The main points of reference in this report are between adults aged 16-24 and a nationally representative sample of the UK adult population as a whole. Where possible, within the sample of younger adults, demographic analysis is conducted by age, gender, socio-economic group, working status, and those living with their parents compared to those living independently. A total of 413 interviews were conducted with younger adults aged 16-24, 206 with those aged 16-19 and 207 with those aged 20-24.

Significance testing at the 95% confidence level was carried out. This means that where findings are commented on, there is only a 5% or less probability that the difference between the samples is by chance.

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3 For more detail on the Media Literacy Audit and its methodology, see the full report and associated documents at [http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_adult08/](http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_adult08/)
Section 2

Access

In this context, access refers to the availability to use, navigate and manage equipment, content and services, rather than simply the availability of services. Without access, people may have limited scope to develop skills and confidence that could benefit them in various aspects of their life. We then explore levels of actual usage by individuals, reasons for using media platforms and preferred media activities, as this starts to give a richer understanding of this group’s overall media literacy.

2.1 Young adults have a high take-up of media platforms

Young adults tend to have higher levels of access to many media devices than adults overall: household ownership of digital television (87% vs. 82%), the internet (71% vs. 62%), and digital radio (93% vs. 88%) is higher among young adults (aged 16-24) compared to UK adults as a whole.

Figure 1: Take-up of media platforms in the home

Within this group of young adults, household ownership of the internet is higher among the younger group of 16-19 year olds compared to those aged 20-24 (82% vs. 63%). Across different demographic groups within the young adult population, there are some key differences regarding take-up of digital television and the internet:

- Those who live with their parents are more likely than those who live independently to have digital television (92% vs. 79%) and the internet (82% vs. 56%) at home. Take-up levels of digital television and the internet among those living independently are at similar levels to all adults. Access to the internet at home is also higher for younger adults aged 16-19 (82%), most of whom live with their parents.

- The socio-economic group of the household is determined by the occupation of the household’s chief income earner, which is likely to be a parent for those young adults who are not living independently. Those in ABC1 socio-economic groups are more likely to have the internet at home than those in C2DE households (85% vs. 57%). While
six in ten younger adults aged 16-19 live in ABC1 households, this is true for half of those aged 20-24.

- Overall, household ownership of the internet is highest among those who are in full-time education (84%), followed by those who are working (72%), and lowest among those who are **neither studying nor working** (42%). Again, there is a link with age and independence, as most 16-19s are in full-time education (56%) while most 20-24s are working (65%). While one in ten 16-19s is neither studying nor working (11%), this is true for one in five 20-24s (19%).

The profile of those who do not have access to the internet at home is similar across the young adult population and the adult population as whole. For both groups, not having the internet at home is more often found among those in C2DE households and those who are not working.

2.2 **Home ownership of the internet among young adults is likely to increase**

People who did not have home access to the internet were asked whether they intended to get access at home in the next year or so. Those that did not intend to get access in the next year or so were asked why, and their reasons were categorised as either voluntary or involuntary. Voluntary reasons are dominated by a perceived lack of need for the internet, while involuntary reasons are where people feel they do not have a choice and mostly relate to affordability, or a lack of knowledge or understanding of the technology.

**Two in five young adults** without home internet access say they **plan to get access** in the next year, which is more than twice the measure across all adults without home internet access (37% vs. 15%). A **similar proportion** of young adults who are non-owners say they are **unsure** whether they will get access in the next year (33% vs. 19%). Those who do not intend to get access in the next year mostly **give an involuntary reason** for this (25% vs. 24% for all adults) rather than a voluntary reason (5% vs. 42%). Involuntary reasons are dominated by affordability issues.

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4 In order to report the relative importance of voluntary versus involuntary reasons these have been calculated so that a) those shown as giving a voluntary reason include those who mentioned a voluntary reason but did not mention any involuntary reasons and b) those shown as giving an involuntary reason gave an involuntary reason, regardless of whether they gave a voluntary reason as well.
2.3 Young adults have a broad range of media activities, with newer media playing an important role

Young adults are more likely than adults as a whole to say they regularly use newer media such as a mobile phone (95% vs. 77%), the internet (76% vs. 56%), and MP3 players (61% vs. 25%). Regular use of mobile phones is near-universal and around three-quarters regularly use the internet. They are also more likely to watch videos/DVDs (78% vs. 63%), listen to music on a hi-fi/CD/tape player (71% vs. 56%) and to play console/computer games (47% vs. 21%).

It is worth noting that young adults are less likely than adults generally to say they regularly use the more traditional media of television (93% vs. 97%) and radio (59% vs. 69%), although the majority still do these things.
Within the young adult population, 16-19s are more likely than 20-24s to regularly use the internet (83% vs. 71%) and to listen to an MP3 player (72% vs. 52%), while 20-24s are more likely than the younger group to read newspapers/magazines (80% vs. 60%) and listen to radio (69% vs. 46%). Those aged 20-24 have the same level of radio listening as adults as a whole (both 69%), but the level of radio listening among 16-19s (46%) is considerably below the all-adult measure (69%).

There are some key differences regarding regular media activities across different demographic groups within the young adult population aged 16-24:

- **Females** are more likely than males to regularly use a mobile phone (98% vs. 92%), while **males** are more likely than females to watch videos/DVDs (82% vs. 73%), listen to an MP3 player (72% vs. 49%), and play console/computer games (69% vs. 22%).

- Those in **ABC1 socio-economic groups** are more likely than those in C2DE socio-economic groups to regularly use a mobile phone (98% vs. 90%) and the internet (89% vs. 63%) and to listen to an MP3 player (69% vs. 53%).

- Those who are in **full-time education** are the most likely to say that they use the internet regularly (88% vs. 70% of those not in full-time education), but they are less likely to regularly watch television (89% vs. 95% of those not in full-time education) or to watch videos/DVDs (71% vs. 82% of those not in full-time education). Those who are working are more likely to read newspapers/magazines compared to those not working (81% vs. 61% of those not working).

### 2.4 Young adults use the internet for a wide range of activities, with a majority using creative functions

As well as being more likely to regularly use the internet, compared to adults as a whole, young adults use the internet for a wider range of functions or activities. Communication (using emails, chat rooms, instant messaging) is the only internet activity undertaken by a

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5 There is no definition of what regular means within the questionnaire and therefore this is defined by the research respondent themselves.
majority of both young adult internet users and all adult internet users. Most young adults who use the internet also use it for work/studies information (60% vs. 48% of all adults) and for at least one creative function such as looking at social networking sites, downloading software, or maintaining a website (55% vs. 22% of all adults).

Figure 4: Internet activities carried out at least once a week

Within the young adult population, 16-19s are more likely than 20-24s to use the internet for work/studies information (71% vs. 49%), creativity (62% vs. 49%), entertainment (36% vs. 26%) and for leisure information (34% vs. 16%). The types of internet activity carried out by 20-24s are generally more similar to those carried out by all adults, with the exception of creative activities, which are undertaken by half in this age group (49% vs. 22% of all adults).

Within the population of 16-24 year olds who use the internet, there are some differences across the demographic groups:

- **Males** are more likely than females to use the internet for creative activities (61% vs. 49%); mostly through being more likely to download software online (22% vs. 13%).

- Those in **ABC1 socio-economic groups** are more likely than those in C2DE socio-economic groups to use the internet for the different types of activities asked about, with the exception of entertainment and leisure information.

- Those who **live with their parents** are more likely than those who live independently to use the internet for creative activities (62% vs. 46%) and for entertainment (38% vs. 19%), while those **living independently** are more likely than those who live with their parents to use the internet for news (27% vs. 16%).

Given the wider use of the internet compared to all adult internet users, it is not surprising that young adults say they use the internet for more hours in a typical week. While the average claimed duration across all adult users is 12.1 hours per week, those aged 16-24 say they use the internet for an average of **14.7 hours per week**. Much of the difference in this overall volume of use is due to home use.
Within the young adult population there is not much variation in volume of claimed use, although it is higher among those in ABC1 socio-economic groups than those in C2DE socio-economic groups (16.8 hours per week vs. 11.8 hours per week). This is due to more use at home (11.5 hours per week vs. 8.4 hours per week) and also at work/their place of education (3.9 hours per week vs. 2.3 hours per week).

2.5 Young adults are using more than one media device at the same time

Younger adults are more likely to use more than one media device at the same time, whether it is watching television, using the internet or using their mobile phone.

While two in three (69%) adults say they ever use another media device while watching television, this rises to almost nine in ten young adults aged 16-24 (86%). Similarly, while three in four of all internet users (74%) say they ever use another media device while using the internet, this rises to over nine in ten young adults who use the internet (95%).

Young adults are most likely to use a mobile phone at the same time as watching television (76% vs. 45% use a landline) or using the internet (80% vs. 50% use a landline). This clear preference for using a mobile phone while watching television or using the internet is not found among adults as a whole; they are equally likely to talk on a landline phone or a mobile phone (for example, 50% ever use a mobile phone while watching television and 49% ever talk on a landline phone while watching television).

Within the young adults population, those aged 16-19 are more likely than the 20-24s to use another device while watching television (90% vs. 83%); they are more likely to go on the internet (42% vs. 25%) or to play computer games (24% vs. 14%) at the same time. However, using another device while using the internet does not vary between the 16-19s and the 20-24s (95% vs. 96%).

For both television and the internet, females aged 16-24 are more likely than males in this age group to talk on a landline at the same time (for example, 51% of young adult females ever use a landline while watching television vs. 40% of young adult males). Males aged 16-
24 are more likely than females in this age group to **play computer games** at the same time as watching the television or using the internet (for example, 27% of young adult males play computer games while watching television vs. 9% of young adult females).

### 2.6 Young adults are divided as to which media activity they would miss the most

To understand how much importance people attach to the various media they use, we asked them to say which single media activity they would miss doing the most. Among adults as a whole, TV is typically given as the medium they would miss the most (one in two say this), but young adults are more divided in opinion. Their **mobile** is the thing they would **miss the most** (33% vs. 13% of all adults), with TV (28% vs. 52% of all adults) and internet (21% vs. 12% of all adults) following. It is clear that newer media – chiefly mobile phones, the internet and MP3 players - have had a significant impact on the media preferences of young adults in general, and on the youngest adults in particular.

**Figure 6: Most-missed media activity**

Within the young adult population, **16-19s** are considerably more likely than **20-24s** to miss using a **mobile phone** (42% vs. 27%), while **20-24s** are more likely than the younger group to miss **watching television** (34% vs. 20%). While both groups of young adults have **stronger preferences for newer media** compared to adults as a whole, this is most apparent for **16-19 year olds**.

There are other differences apparent within the population:

- While young adults as a whole are most likely to say they would **miss their mobile phone** the most, this is more common among **females** than males (39% vs. 29%).

- Those in **ABC1 socio-economic groups** are more likely than those in **C2DE socio-economic groups** to miss using the **internet** (30% vs. 11%), while those in **C2DE**
socio-economic groups are more likely than those in ABC1 socio-economic groups to miss watching television (39% vs. 18%).
Section 3

Understand and create

In this section we look at people’s understanding of media services and content. In particular, we focus on the degree of people’s interest in, and confidence in using, the services and functions available on different media devices. We also examine people’s experience of, and interest in, creating content and using the internet for creative functions, their awareness of funding sources and regulation, their levels of trust in media and caution when using websites, and their concerns regarding media and associated content.

3.1 Young adults have high levels of interest and confidence in using digital television services and internet functions

Those who have multichannel television at home were asked whether they were interested in, and confident using, four different interactive services. With the exception of blocking access with a PIN code, levels of interest and confidence are higher among 16-24s than among the adult population as a whole. Across the four digital television services 68% of 16-24s are interested in and confident using any of the services, compared to 56% of all adults. Few (2%) of the 16-24 year olds are parents, and so the finding that two in five are interested in setting a PIN code to block access to certain channels or programmes is likely to be an indicator of their greater engagement with digital services generally.

Within the young adult population, there are no real variations in interest and confidence in using digital television services between those aged 16-19 and those aged 20-24. Interest in each of these multichannel television services is, however, higher among males than among females (82% vs. 73%) and higher among those in ABC1 socio-economic groups than among those in C2DE socio-economic groups (82% vs. 72%).

**Females** and those in **C2DE socio-economic groups** are generally **less interested** rather than less confident. While 23% of all 16-24s with multichannel television at home say they
are not interested in any of these services, this measure rises to 27% for females and 28% for those in C2DE socio-economic groups. Across all adults, 33% say they are not interested in any of these services, and this measure again rises for females and those in C2DE socio-economic groups.

Levels of interest and confidence in using nine functions associated with the internet were assessed among those who use the internet at home or elsewhere. As with the adult population as a whole, of all the functions asked about, young adults are most likely to say they are interested but not confident in installing security features and filtering software; with one in four internet users giving this response. The research did not find higher levels of interest and confidence relating to security, despite young adults’ tendency to use the internet more and for a wider range of tasks than adults as a whole.

Levels of interest and confidence in using email and in buying things over the internet also do not vary from the whole adult population of internet users. However, there are different levels of interest and confidence for all of the remaining internet functions we asked about; with lower interest in finding out about local services and banking online, and higher interest and confidence in transferring photos, joining in debates online and listening to radio over a computer.

**Figure 8: Interest and confidence in using internet functions**

<table>
<thead>
<tr>
<th>Function</th>
<th>All adults 16+</th>
<th>All aged 16-24</th>
<th>All adults 16+</th>
<th>All aged 16-24</th>
</tr>
</thead>
<tbody>
<tr>
<td>Install security features like a firewall,</td>
<td>25%</td>
<td>27%</td>
<td>67%</td>
<td>66%</td>
</tr>
<tr>
<td>anti-spy or antivirus software</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Install software on a computer which can control or</td>
<td>25%</td>
<td>27%</td>
<td>67%</td>
<td>66%</td>
</tr>
<tr>
<td>block access to certain websites</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfer photos from a digital camera or mobile</td>
<td>18%</td>
<td>19%</td>
<td>97%</td>
<td>97%</td>
</tr>
<tr>
<td>phone to a computer</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use e-mail to contact friends and relatives</td>
<td>14%</td>
<td>15%</td>
<td>74%</td>
<td>74%</td>
</tr>
<tr>
<td>Buy things over the internet</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Find out about local services including the council,</td>
<td>10%</td>
<td>10%</td>
<td>87%</td>
<td>87%</td>
</tr>
<tr>
<td>hospital, leisure facilities and so on</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do my banking over the internet</td>
<td>9%</td>
<td>10%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Join in debates about subjects that interest me</td>
<td>8%</td>
<td>12%</td>
<td>26%</td>
<td>33%</td>
</tr>
<tr>
<td>through posting comments on websites</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Listen to radio over a computer</td>
<td>8%</td>
<td>10%</td>
<td>44%</td>
<td>56%</td>
</tr>
</tbody>
</table>

IN7A.4 – Please look at the options shown on this card. I’m going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one I’d like you to say which of the options on the card applies to you.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

There are some differences between the youngest adults, aged 16-19, and those aged 20-24. Levels of interest and confidence are higher among 20-24s for buying things, finding out about local services, banking, joining in debates online, and listening to radio online. For these five functions, those aged 16-19 are more likely to say they are interested but not confident. As credit cards (excluding some pre-paid cards) are not available to under-18s in their own right, this is likely to be a factor in the lower level of interest in this function among the 16-19s. Unlike digital television
services, where one in five young adults with access says they are not interested in the services we asked about, virtually all young adults are interested in at least one of the nine internet services that we asked about.

There are some differences in the level of interest in these internet functions by the socio-economic group of the young adults surveyed. Higher levels of interest and confidence are evident among those in **ABC1 socio-economic groups**, compared to those in C2DE socio-economic groups, regarding using **email** (86% vs. 79%), transferring **photos** (79% vs. 67%), finding out about **local services** (65% vs. 54%), **banking online** (50% vs. 31%), and joining in **debates** online (36% vs. 25%).

Four of the nine internet functions show differences between males and females in the young adult population. Two functions have **higher interest and confidence among males** compared to females: installing **security features** like a firewall or antivirus software (61% vs. 49%) and installing **filtering software** (58% vs. 44%). While females are less interested than males in installing security features, they are less confident (rather than less interested) in installing filtering software. Two functions have **higher interest and confidence among females** compared to males: **buying things** over the internet (78% vs. 68%) and **banking online** (47% vs. 38%). Males are less interested than females in both of these functions.

### 3.2 Most young adults have experience of using the internet for creative functions

A majority (74%) of young adult internet users have experience of using the internet for at least one of the seven types of **creative activities** we asked about (see Figure 9). The most common are **uploading photos** to the internet (64%) and having a **social networking site profile** (54%). This is equivalent to just under half (44%) of all 16-24 year olds having a social networking profile. By comparison, one in five (22%) of all adult internet users has a social networking profile, equivalent to around one in ten (13%) of all adults.

Young adults are **more likely** than the general adult population to have experience of or interest in each of the seven **creative activities** we asked about. Within the young adult population, experience of each of the activities is **higher among the youngest adults**, aged 16-19. The greatest differences between 16-19s and 20-24s relates to experience of setting up a blog (36% vs. 17%), having a social networking site profile (62% vs. 46%), and setting up a personal website (29% vs. 15%). Experience of creative activities among those aged 20-24 is closer to the measure for all adults than the measure for those aged 16-19 for setting up a personal website or blog.
Figure 9: Experience of creative activities

Other than the clear differences between those aged 16-19 and those aged 20-24 in terms of their experience of creative activities, there are relatively few differences within the young adult population. Those in **ABC1** socio-economic groups are more likely than those in **C2DE** socio-economic groups to have experience of setting up a **social networking profile** (61% vs. 44%) and **contributing to a blog** (48% vs. 33%). **Males** are more likely than females to have **uploaded photos** to the internet (68% vs. 58%) and to have **uploaded a short video** (27% vs. 15%), but experience does not vary by gender for the other activities.

### 3.3 Most young adults with social networking site profiles use more than one site

**Three social networking sites** are used by more than half of young adults with a social networking profile: Facebook (65%), MySpace (55%) and Bebo (51%). No other site is used by more than 10% of users. The number of social networking site users aged 20-24 that we interviewed is below 100 (74) and so findings for this older group should be treated with caution. It appears that 20-24 year old social networking site users are more likely than 16-19s to use Facebook (74% vs. 58%) and less likely to use Bebo (34% vs. 64%). **Over half** (54%) of social networking site users have a profile on **more than one site**, and this is more common for **16-19s** than 20-24s (60% vs. 47%).

Close to half (48%) of those with a social networking site profile say that their profile can be **seen by anyone**, rather than just by their friends. This appears to be more common among **16-19s** than among 20-24s (54% vs. 42%), but these findings should be treated with caution as the number of interviews conducted within these groups is below 100. Similarly, not restricting privacy settings appears to be more common among **males** than females (60% vs. 34%), but these findings should be treated with caution due the sample sizes.
A majority of those with a social networking site profile (77%) visit sites at least twice a week, and this appears to be more common among 16-19s than 20-24s (85% vs. 65%), but does not vary between males and females.

The most popular uses of social networking sites among young adults are to talk to friends and family they see a lot (80%) or rarely see (68%), and to look for old friends they have lost touch with (53%). One in five social networking site users (22%) regularly use the sites to talk to people they don’t know. Within the young adult population there are some differences in terms of what social networking sites are used for:

- **Females** are more likely than males to use the sites to look for old friends they have lost touch with (72% vs. 38%), while **males** are more likely than females to use the sites to talk to people they don’t know (27% vs. 15%).

- Those in **ABC1** socio-economic groups are more likely than those in C2DE socio-economic groups to use the sites to talk to friends and family they rarely see (80% vs. 46%).

### 3.4 Most young adults use the internet to access music, video clips or longer videos

Most young adult internet users have ever used the internet to listen to or download music (83%) and to watch or download video clips (77%) and longer video content such as films or television programmes (60%). Music is accessed online more frequently than video; with over half of young adult internet users (55%) listening to or downloading music online at least weekly. This compares to a measure of one in four of all adult internet users (26%).

The youngest internet users, aged 16-19, more frequently access music than 20-24s (59% weekly vs. 51%), but those aged 20-24 more frequently access longer videos (24% weekly vs. 18%). **Males** more frequently access video content than females; both video clips (51% weekly vs. 33%) and longer videos (27% weekly vs. 15%).

**Figure 10: Frequency of viewing and downloading video and music content**
3.5 Young adults have high levels of interest and confidence in using mobile phone functions

The research assessed mobile phone owners' levels of interest and confidence in using five specific functions. As with the adult population as a whole, young adults are likely to say they are interested in, and confident with, each of the five functions, but confidence levels among young adults exceed those found for all adults. Young adults particularly stand out as being more interested and confident using their mobile phone to access mobile operators' internet sites; with two in three (64%) interested, compared to a minority (43%) of all mobile phone users.

Figure 11: Interest and confidence in using mobile phone functions

There are relatively few differences within the young adults in levels of interest and confidence with mobile phone functions, compared to multichannel television services and internet functions. Females are the most interested and confident in using their phone to send photos to others (84% interested and confident vs. 75% males), while interest in accessing mobile operators' internet sites is lower among those who are neither studying nor working (54% interested vs. 64% of young adults) and those in C2DE socio-economic groups (55% interested vs. 64% of young adults).

3.6 Young adults are relatively unaware of how media content is funded

Compared to all adults aged 16 and over, young adults aged 16-24 are relatively unaware of how media content is funded. Awareness of the correct main source of funding for television programmes and radio stations among young adults is around 20 percentage points below the level for all adults. BBC TV programmes are the only type of content where most young adults (57%) are aware of the main source of funding; in this case the licence fee. In all cases, young adults are more likely to say they don't know how that type of content is funded than to give an incorrect response. Awareness of media content funding is lower in all cases among 16-19s compared to 20-24s.
Young adults in ABC1 socio-economic groups are generally more aware of media content funding than those in C2DE socio-economic groups, specifically:

- BBC TV programmes (62% vs. 52%);
- BBC radio stations (49% vs. 31%);
- commercial radio stations (44% vs. 27%); and
- search engine websites (24% vs. 19%).

Awareness of media content funding does not differ between males and females, with the exception of funding for the BBC website (31% females vs. 22% males).

3.7 Young adults are less aware of television and radio content regulation

Compared to all adults aged 16 and over, young adults aged 16-24 are relatively unaware of whether television or radio broadcasts are regulated. Awareness that television and radio broadcasts are regulated is around 12 percentage points below the level for all adults. For both television and radio broadcasts, young adults are more likely to say they don’t know whether the broadcasts are regulated than to say they are not regulated.

There is no clear consensus within the young adult population as to whether internet content is regulated. This is also the case for the general adult population. The youngest adults, aged 16-19, are more likely than those aged 20-24 to say that internet content is regulated (34% vs. 21%).

Young adults are more likely than the general adult population to have an opinion as to whether mobile phone content is regulated, but there is no clear consensus. The youngest adults, aged 16-19, are the most likely to be mobile phone users, and this group is more
likely than those aged 20-24 to say that mobile phone content is not regulated (44% vs. 32%).

Similarly, while young adults are more likely than all adults aged 16 and over to believe that gaming is regulated (36% vs. 29%), there is no clear consensus over whether this is the case or not.

### Figure 13: Whether believe platform content is regulated

<table>
<thead>
<tr>
<th>Platform</th>
<th>All aged 16+</th>
<th>Aged 16-24</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV programmes</td>
<td>70/68</td>
<td>75/66</td>
</tr>
<tr>
<td>Radio</td>
<td>44/56</td>
<td>40/58</td>
</tr>
<tr>
<td>Internet</td>
<td>31/35</td>
<td>27/30</td>
</tr>
<tr>
<td>Mobile phone content</td>
<td>31/21</td>
<td>36/25</td>
</tr>
<tr>
<td>Gaming</td>
<td>21/37</td>
<td>26/33</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Platform</th>
<th>Yes, regulated</th>
<th>No, not regulated</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV programmes</td>
<td>70%</td>
<td>15%</td>
<td>5%</td>
</tr>
<tr>
<td>Radio</td>
<td>44%</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>Internet</td>
<td>27%</td>
<td>35%</td>
<td>36%</td>
</tr>
<tr>
<td>Mobile phone content</td>
<td>31%</td>
<td>30%</td>
<td>34%</td>
</tr>
<tr>
<td>Gaming</td>
<td>21%</td>
<td>26%</td>
<td>40%</td>
</tr>
</tbody>
</table>

T12/ R9/ N38/ M7/ G6 – As far as you are aware, are TV programmes/ is radio/ is the internet/ is mobile phone content/ is gaming regulated at all?
Base: All adults aged 16+ (2005 aged 16+, 413 aged 16-24)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

### 3.8 Young adults are more likely to believe that some online content is regulated

The research also asked if people thought that specific types of online content were regulated. This identified a level of confusion as to which types of internet content, if any, are regulated; with three in five of all adults (57%) and half of young adults (51%) unsure. Young adults are, however, more likely than the general adult population to believe that internet content available on sites such as YouTube is regulated (21% vs. 10%).

This belief is more evident among the youngest adults aged 16-19, with responses from those aged 20-24 closer to those given by adults as a whole (27% vs. 16%).

It is possible that there is confusion here between industry self-regulation (where industry administers a solution without formal oversight), co-regulation (where a form of statutory control is present) and full statutory regulation.
Figure 14: Whether believe online content is regulated

![Bar chart showing percentage of young adults aged 16-24 who believe online content is regulated.]

IN46 – Which, if any, of the following do you think are regulated in terms of what can be shown on the internet?
Base: All adults aged 16+ (2905 aged 16+, 413 aged 16-24)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

3.9 Young adults are relatively unaware of the television watershed

Although two in three young adults (66%) are aware that there is a television watershed starting at 9pm, awareness is lower than among the general adult population (78%).

Figure 15: Perceptions of the television watershed

![Bar chart showing percentage of young adults aged 16-24 who are aware of the television watershed.]

T14 – Is there a time of day after which TV programmes on the main TV channels that are considered unsuitable for children can be shown?
Base: All adults aged 16+ (2905 aged 16+, 413 aged 16-24)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Within the young adult population, awareness of the 9pm television watershed is lower among those aged 16-19 than among 20-24s (59% vs. 72%) and those living with their parents compared to those living independently (61% vs. 73%).

3.10 Trust in content differs by platform

Young adults express different levels of trust in the content they see or hear, depending on the type of platform. Over half (56%) of young adults who listen to the radio at home trust what they hear, with most of the remainder neutral. Less than half of viewers trust...
what they see on television (42%) or on the internet (43%), with the remainder broadly equally split between those who are neutral and those who do not trust what they see on television or on the internet. Levels of trust in television, radio and internet content are at similar levels to the general adult population6.

Figure 16: Trust in platform content: When I watch/ listen to [platform] I tend to trust what I see/ hear

Across different demographic groups within the young adult population, there are some key differences regarding trust in platform content:

- Those who are studying are more likely to distrust what they see on television (31%), hear on the radio (21%) or see on the internet (30%).

- Females are more likely than males to distrust what they see on television (32% vs. 21%) or hear on the radio (18% vs. 13%), while males are more likely than females to distrust what they encounter on the internet (30% vs. 20%).

3.11 Few young adults believe they can tell whether websites are truthful and reliable

As young adults using the internet are higher-volume users, regularly undertaking a broader range of tasks online than internet users as a whole, it is not surprising to see that most are very confident both in terms of finding what they want online and using creative elements.

By contrast, just one in four (25%) young adults is very confident in being able to tell if a website is truthful and reliable – similar to the response (20%) from all adults who use the

6 This research asks about trust in the platform overall. Responses to this question may reflect the type of content people actually access through each platform, and responses may differ if particular genres of content were specifically focused on.
internet. As such, while young adults are more confident with the functionality of the internet than the general adult population, they are no more able to discern whether websites are truthful and reliable.

**Figure 17: Confidence using the internet**

![Confidence using the internet chart](chart.png)

The extent to which young adults are very confident in being able to tell if a website is truthful and reliable is lower among 20-24s than among 16-19s (20% vs. 30%) and lower among females compared to males (18% vs. 31%).

### 3.12 Most young adults claim to check new websites before using them

Four in five young adults claim to make any of the checks we asked about when visiting a new website; the most common check is how up to date the information is, undertaken by half (47%). The extent to which any of these checks are made, and the types of checks made by internet users, do not vary from the general adult population.

So while young adults are higher-volume users, regularly undertaking a broader range of tasks online than internet users as a whole, they are no more likely to routinely make checks on new websites. Young adults aged 20-24 are more likely to make at least one of the checks we asked about when visiting new websites than those aged 16-19 (83% vs. 75%).
Within the young adult population, checks on new websites are more likely to be made by females than by males (84% vs. 74%), and by those in ABC1 socio-economic groups compared to those in C2DE socio-economic groups (87% vs. 67%) and by those who live independently rather than those who live with their parents (85% vs. 75%).

### 3.13 Young adults are less likely to make judgements about a website before entering personal details

While three in four young adults (76%) say they would make some kind of judgement about a website before entering personal details (for example, based on signage within the site, personal instinct or peer information), this is below the level for the general adult population (83%). This difference is mostly due to the youngest adults, aged 16-19, being less likely to make judgements based on professional signs such as a padlock symbol, system messages or kitemarks (38% vs. 47% aged 20-24).

Within the young adult population, there are some key differences across different demographic groups regarding making judgements about websites:
- **Males** are less likely than females to say they make any judgements (63% vs. 77%), while **females** are more likely than males to make judgements based on personal instinct, such as whether the site looks professional (49% vs. 36%).

- Those who are **working** are more likely to say they make judgements based on professional signs, such as a kitemark, system messages or the padlock sign (51% vs. 35% of those studying).

- Those in **C2DE** socio-economic groups are more likely than those in ABC1 socio-economic groups to say they **do not trust any site** in terms of entering personal details (10% vs. 4%).

### 3.14 Young adults are less concerned about the security of entering personal details online

When using a website, users may be asked to provide different types of personal details. Across four of the six types that we covered, young adults are less likely to have concerns about providing these personal details, compared to all adults who use the internet.

Concerns about entering personal details are least evident among those aged 20-24. These young adults are more likely to use the internet for banking and paying bills and for shopping, but are also most likely to say they make judgements on websites using professional signs such as padlock symbols or kitemarks.

#### Figure 20: Information prepared to give when using websites

- **Entering your personal e-mail address**
  - All adults 16+ 49% happy to do this, 36% have some concerns, 9% would never do this, 3% don’t know
  - All aged 16-24 51% happy to do this, 36% have some concerns, 10% would never do this, 2% don’t know

- **Entering your home address details**
  - All adults 16+ 36% happy to do this, 60% have some concerns, 12% would never do this, 9% don’t know
  - All aged 16-24 34% happy to do this, 48% have some concerns, 9% would never do this, 2% don’t know

- **Entering your mobile phone number**
  - All adults 16+ 34% happy to do this, 63% have some concerns, 10% would never do this, 3% don’t know
  - All aged 16-24 32% happy to do this, 44% have some concerns, 23% would never do this, 2% don’t know

- **Paying by entering your credit card details**
  - All adults 16+ 32% happy to do this, 41% have some concerns, 23% would never do this, 1% don’t know
  - All aged 16-24 30% happy to do this, 41% have some concerns, 17% would never do this, 1% don’t know

- **Paying by entering your debit card details**
  - All adults 16+ 27% happy to do this, 41% have some concerns, 23% would never do this, 1% don’t know
  - All aged 16-24 27% happy to do this, 41% have some concerns, 21% would never do this, 1% don’t know

**IN41** – Please look at the options shown on this card. I’m going to read out some details about information you could be asked to enter when you’re on the internet, and for each one I’d like you to say how you would feel about doing this in terms of any security concerns.

*Base: Adults aged 16+ who use the internet at home or elsewhere (1723 aged 16+, 336 aged 16-24)*

Source: Ofcom research, fieldwork carried out by Saville Rosaliter-Base in October to December 2007

Within the young adult population some themes emerge regarding concerns about entering personal details online:

- **Males** are more likely than females to be happy to provide their mobile phone number (39% vs. 24%) or personal email address (57% vs. 43%), while **females**
are more likely than males to have some concerns about entering these details or their home address details.

- Those in C2DE socio-economic groups are more likely than those in ABC1 socio-economic groups to say they would never provide their credit card details (27% vs. 15%) or debit card details (32% vs. 16%), with this group also more likely to say they do not trust any websites (10% vs. 4%).

### 3.15 Young adults are less likely to have concerns about most platforms

Of all the platforms, young adults have most concerns about the internet; with half (53%) mentioning any concerns. Just over one in four young adults (26%) has concerns about television or mobile phones (25%), one in five has concerns about gaming (17%), and one in eight has any concerns about radio (12%).

The extent of any concerns do not vary between those aged 16-19 and those aged 20-24, with the exception of the internet; where those aged 20-24 are more likely to have concerns.

Compared to the general adult population, young adults are considerably less likely to have concerns about each media platform, with the exception of radio – where 12% of young adults and the general adult population say they have concerns. Across television, radio, the internet, mobile phones and gaming there are no specific concerns that are more likely to be mentioned by young adults than by all adults.

#### Figure 21: Concerns about media platforms

![Figure 21: Concerns about media platforms](image)

Within the young adult population, there are some key differences across different demographic groups in terms of the extent of concerns:

- **Females** are more likely than males to have concerns about each platform, with the exception of radio.

- Those who are neither working nor studying are more likely to have any concerns about what is on television, while those who are studying are more likely to have concerns about gaming.
• In relation to television, no single concern is mentioned by more than 10% of all young adults. Among females, however, there are higher mentions of concerns about sex/nakedness (15%), and violence (12%). For those who are neither working nor studying, there are higher mentions of concerns about too many repeats (14%), bad language (11%) and too many advertising breaks (10%).

• Regarding radio, no single concern is mentioned by more than 10% of all young adults or any of the sub-groups of young adults. The top three concerns mentioned by young adults are bad language (spoken or song lyrics) (3%), too many advertising breaks (3%), and bad taste/shock tactics (2%). These are also the top three concerns across all adults, with a similar share of all adults giving these responses.

• In relation to the internet, the top five concerns mentioned by young adults are people masquerading as younger people online (29%), sexual content/pornography (21%), unsuitability for children (16%), computer viruses/bugs (14%), and identity fraud (14%). Females are more likely than males to mention each of these concerns. While those aged 16-19 are more likely than those aged 20-24 to mention concerns about computer viruses/bugs (19% vs. 10%), those aged 20-24 are more likely than those aged 16-19 to mention concerns about people masquerading as younger people online (39% vs. 19%).

• Regarding mobile phones, no single concern is mentioned by more than 10% of all young adults. Those in ABC1 socio-economic groups are more likely than those in C2DE socio-economic groups to mention health concerns about using a phone handset (11% vs. 5%).

• Regarding gaming, just one concern is mentioned by 10% or more of all young adults: violent content (11%). Concern about violent content is more likely to be mentioned by females compared to males (18% vs. 5%), by those in ABC1 rather than C2DE socio-economic groups (14% vs. 7%) and by those who are studying (19%).
Section 4

Learning

4.1 Young adults are more likely to prefer to learn about using digital technology independently

All adults were prompted with a list of five options and were asked to say in which ways they preferred to learn about using services and products such as digital television and radio, the internet and mobile phones.

Of the five options, the preferred ways to learn about using digital technology by young adults are asking friends or family (49%) and trial and error (47%), followed by reading the manual (41%). While the top three preferred ways to learn match those given by all adults, young adults are more likely to say they prefer to learn through trial and error (47% vs. 40%), and also to prefer to find out from the supplier or store (16% vs. 12%).

**Figure 22: Preference for learning about digital technology**

Within the young adult population, there are some key differences across different demographic groups in terms of preferred ways to learn about using digital technology:

- **Females** are more likely than males to prefer to learn through **friends and family** (59% vs. 40%), while **males** are more likely than females to prefer to learn through **trial and error** (55% vs. 39%).

- Few young adults say they prefer to learn through **going to a class**, but this method is more likely to be preferred by 16-19s (13% vs. 4% of 20-24s), those in **ABC1** socio-
economic groups (11% vs. 5% of C2DEs) and those who are **studying** (18% vs. 3% of those who are not studying).

### 4.2 Two in five young adults have learned about digital technology through classes or training

While one in four UK adults (27%) say they have experience of learning about digital technology through classes or any other type of training, this is considerably more common among young adults aged 16-24 (43%). Within the young adult population, those aged 16-19 are more likely than 20-24s to have experience of this type of training or learning through classes (51% vs. 37%). Experience among 20-24s is still more common than among all adults, however.

**Figure 23: Experience of learning about digital technology**

While experience of learning about digital technology does not vary by gender, there are some differences in experience within the young adult population:

- Those in **ABC1** socio-economic groups are **more likely** than those in **C2DE** socio-economic groups to have experience of learning about creating a website (22% vs. 12%) and editing digital content (14% vs. 7%). However, the overall level of experience of learning about digital technology does not vary by socio-economic group.

- **More than half** of those who are studying have any experience of learning about digital technology (58% vs. 36% of those not studying), with much of this difference accounted for by experience of learning about using the internet (49% vs. 25%).
4.3 Young adults are more likely to be interested in learning more about digital technology

Two in five young adults are interested in learning more about any of the aspects of digital technology that we asked about, compared to one in three across the general adult population (38% vs. 31%), although we do not see markedly higher levels of interest in any single topic.

Within the young adult population, those aged 16-19 are much more likely to be interested in learning more than those aged 20-24 (45% vs. 32%). However, those aged 20-24 are more likely to be interested in learning about using the internet (16% vs. 8%).

Figure 24: Interest in learning about digital technology

Interest in learning about digital technology does not vary by gender, but there are some differences within the young adult population;

- Those who are studying are more interested in learning across the different topics that we asked about (52% vs. 32% of those not studying), and in particular learning about creating a website (17% vs. 6%) and how programmes are made (10% vs. 6%).

- However, those who are neither working nor studying are more likely to be interested in learning about the internet (21% vs. 11% of those who are either working or studying).
Section 5

Media attitudes and behaviours

As part of the 2008 Media Literacy Audit research, data about people’s attitudes and behaviours relating to communications technologies were analysed and a total of five segments were identified, based on the relationship people have with media devices. This section looks at how young adults compare to the general adult population in terms of this segmentation.

5.1 Seven in ten young adults are in the two most digitally engaged segments

The research findings about people’s attitudes and behaviours were analysed and five segments across the adult population were identified, based on the relationship people have with media devices. The following table summarises the attitudes and behaviours of each of the five segments.

Table 1: Summary of attitudes to media services, by segment

<table>
<thead>
<tr>
<th>Most likely to own and use…</th>
<th>Engaged</th>
<th>Pragmatist</th>
<th>Economisers</th>
<th>Hesitants</th>
<th>Resistor</th>
</tr>
</thead>
<tbody>
<tr>
<td>I could do it without it. That’s clever – how do I get more out of it?</td>
<td>Everything</td>
<td>Everything within reason – where they can see a benefit</td>
<td>Everything but the internet – with one eye on costs</td>
<td>A mobile phone, but probably live in households with things they don’t use</td>
<td>Nothing, or only digital television</td>
</tr>
<tr>
<td>Most likely to say…</td>
<td>I couldn’t do it without it. That’s clever – how do I get more out of it?</td>
<td>What use is it – will I use it?</td>
<td>I’d really like to be able to do that</td>
<td>Someone else does that</td>
<td>It’s just not for me</td>
</tr>
<tr>
<td>Most likely to be put off because…</td>
<td>I have too many other things to do</td>
<td>I can already do that another way – why do I need this as well?</td>
<td>I can’t afford it</td>
<td>I don’t know where to start, I’m afraid of breaking it</td>
<td>I’d get no value or benefit from this</td>
</tr>
<tr>
<td>More likely to be…</td>
<td>Younger, ABC1, in metropolitan areas including deprived areas</td>
<td>Younger, C2DE, from metropolitan areas</td>
<td>Older (although 43% under 45), more women than men</td>
<td>Older</td>
<td></td>
</tr>
</tbody>
</table>

Figure 25 shows the segmentation based on all adults aged 16+ and the profile of how young people in particular are distributed between these groups. All analysis is based on the overall segmentation for all adults 16+.

The two segments that have the highest engagement with media services are the Engaged and the Pragmatists. Half (51%) of all adults aged 16 and over are in one of these two most engaged segments. By comparison, seven in ten (70%) young adults fall within these two most engaged segments. A further 18% of young people fall within the Economisers group, which is characterised by a lower level of internet access and issues related to perceived costs.
The Engaged segment is double the size in the young adult population compared to all adults (41% vs. 21%), and this is also the case for the Economisers segment (18% vs. 8%), while the Pragmatists segment is much the same size in both populations (29% vs. 30%). By contrast, the Hesitants segment is one-third of the size in the young adult population compared to all adults (11% vs. 31%), and very few young adults are in the Resistors segment (1% vs. 10%).

Figure 26 shows the profile of 16-19 year olds and 20-24 years olds in terms of their distribution within the overall segmentation. There are some key differences in the breakdown of segments across the two age groups within the young adult population. The youngest adults aged 16-19 are more likely to be in the Engaged segment compared to the 20-24s (50% vs. 34%), while the 20-24s are more likely to be in the Economisers segment than the 16-19s (25% vs. 9%). As discussed earlier, in relation to the lower take-up of the internet among Economisers, young adults aged 20-24 are much more likely to be living independently than those aged 16-19, who are mostly still living with their parents.

Within the young adult population, there are some key differences across different demographic groups in terms of the segmentation:

- **Males** are more likely than females to be in the Engaged segment (47% vs. 34%), while **females** are more likely than males to be in the Pragmatists segment (34% vs. 25%).

- Those in **ABC1 socio-economic groups** are more likely than those in C2DE socio-economic groups to be in the Engaged segment (50% vs. 31%), while those in **C2DE socio-economic groups** are more likely than those in ABC1 socio-economic groups to
be in either the **Economisers** segment (22% vs. 15%) or the **Hesitants** segment (15% vs. 7%).

- Those who are **neither working nor studying** differ considerably from the overall population of young adults; they are more likely to be in the **Economisers** segment (33% vs. 18% of all aged 16-24) or the **Hesitants** segment (21% vs. 11% of all aged 16-24) and less likely to be in the **Engaged** segment (19% vs. 41% of all aged 16-24).

- Those who are **working** are more likely than those who are studying to be in the **Economisers** segment (19% vs. 9%).