



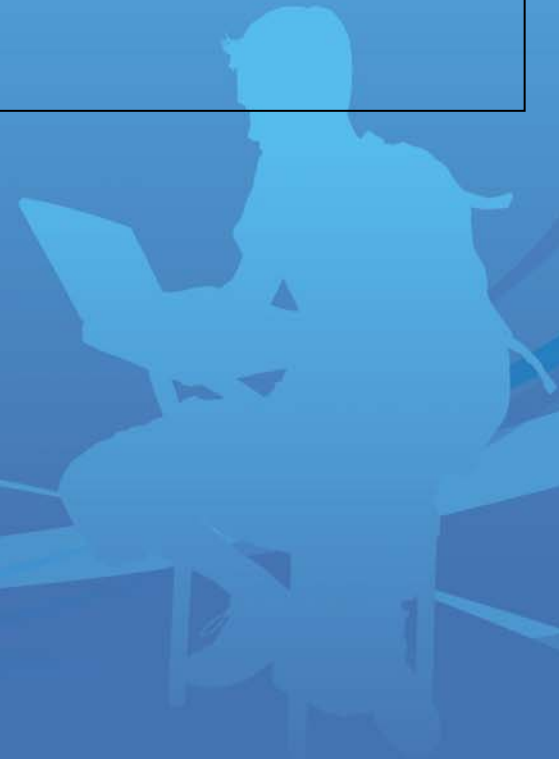
TCS Generation Web 2.0 TRENDS

2008-09

**A comprehensive nationwide study
across 12 Indian cities reaching over
14,000 kids**



- India's largest IT quiz for schools
- Started in 1999, celebrated its 10th anniversary in 2008.
- Held across 12 Indian cities
- More than 200,000 students from over 2,000 schools covered annually



TCS Generation Web 2.0 Survey

Objectives

- ❑ A Nationwide study to capture the trends and pulse of the youth across India with a clear focus on information, technology and aspirations.
- ❑ To capture and compare trends of students in the major metros and mini metros of India.
- ❑ A first of its kind study of this scale to capture key youth trends listed below :
 - ⑩ Information access
 - ⑩ Social networking preferences
 - ⑩ Future education mindset and Career interests
 - ⑩ Youth and Technology



Survey Reach

- ❑ 12 cities across India
- ❑ Classified as Metros and Mini

Metros



Respondent profile

- ❑ Largely from English medium schools
- ❑ Captures trends in Urban India
- ❑ Age: 12 to 18 years
- ❑ Total survey respondents – 13,738

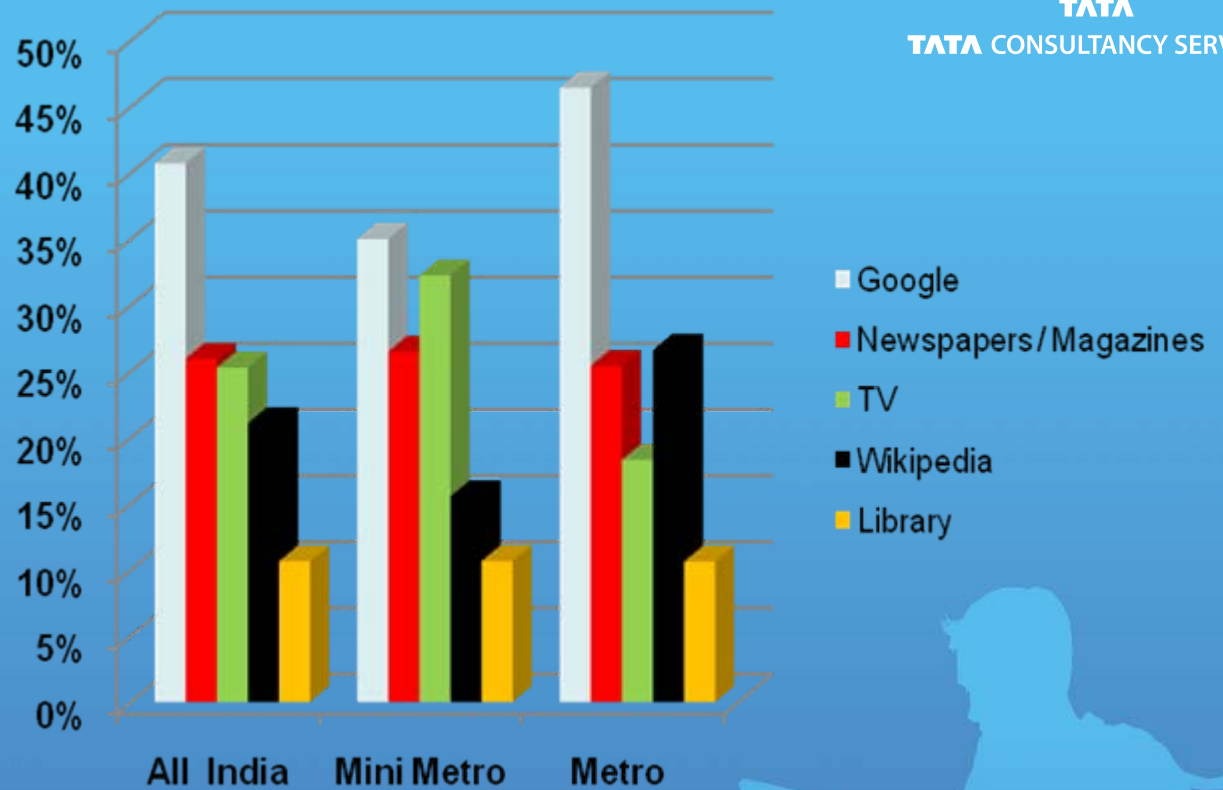


Survey Findings



Survey Findings
INFORMATION
ACCESS

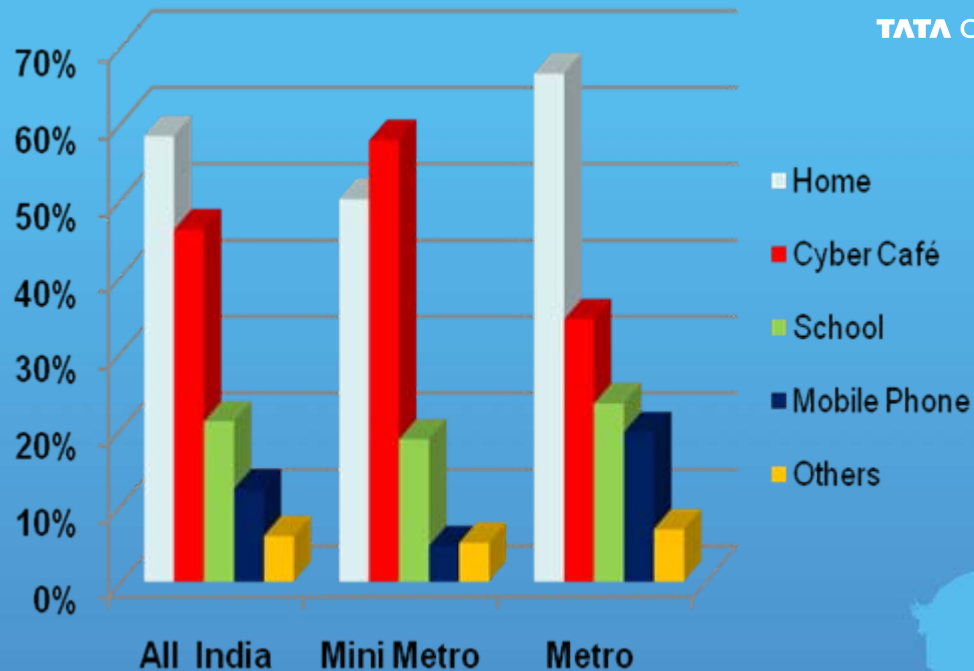
Information access



□ Google (41%) emerges as most preferred source of Information

- Print (26%) and TV (25%) are the next important source of information
- Highest number of students using internet (Google + Wikipedia): Kolkata 77%
- Library usage amongst Cochin students is highest nationally (14%)
- Bhubaneswar (45%) and Lucknow (42%) lead in information sourced through television while, Mumbai (12%) youth prefer it the least

Information access

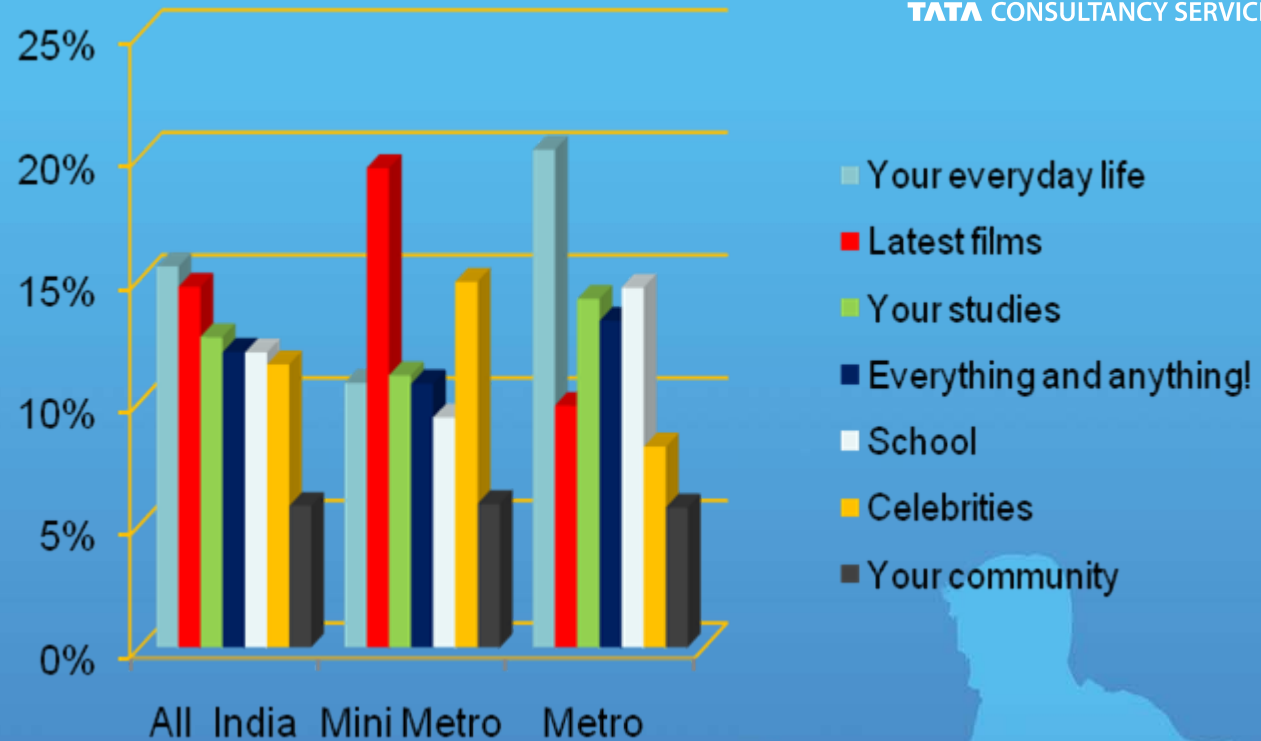


- ❑ Home access is most popular across India
 - ❑ Chennai tops the internet usage from home (75%) nationally
 - ❑ Among Mini metros, Ahmedabad leads in internet access at home (63%)
- ❑ In the Mini Metros, cyber cafés are the primary access points (58%)
 - ❑ Cochin tops in information access through cyber cafes (65%)
- ❑ Internet access from school is highest in Delhi (31%).
 - ❑ Among Mini Metros, Ahmedabad tops on internet usage from school (28%)
- ❑ Kolkata tops internet access from mobile (24%)

Survey Findings

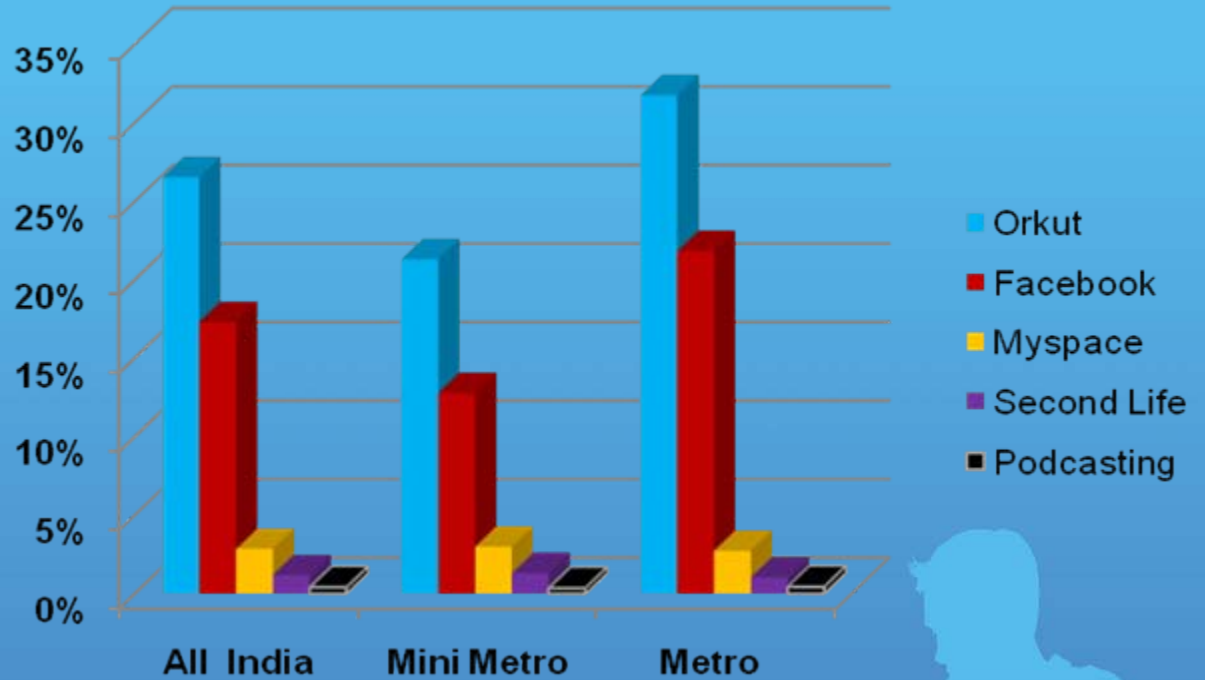
SOCIAL NETWORKING TRENDS

Social networking trends



- ❑ Blogging in metros revolves largely around their everyday life
 - ❑ **Bangalore is the blogging capital of India, with 66% of students being part of blogging / social networking scene, against 39% nationally.**
- ❑ More students in Mumbai (60%) and Ahmedabad (57%) read about film and celebrity blogs than youth in any other city
- ❑ Bangalore and Hyderabad (33% each) students prefer blogging on studies and school, highest nationally

Social networking trends

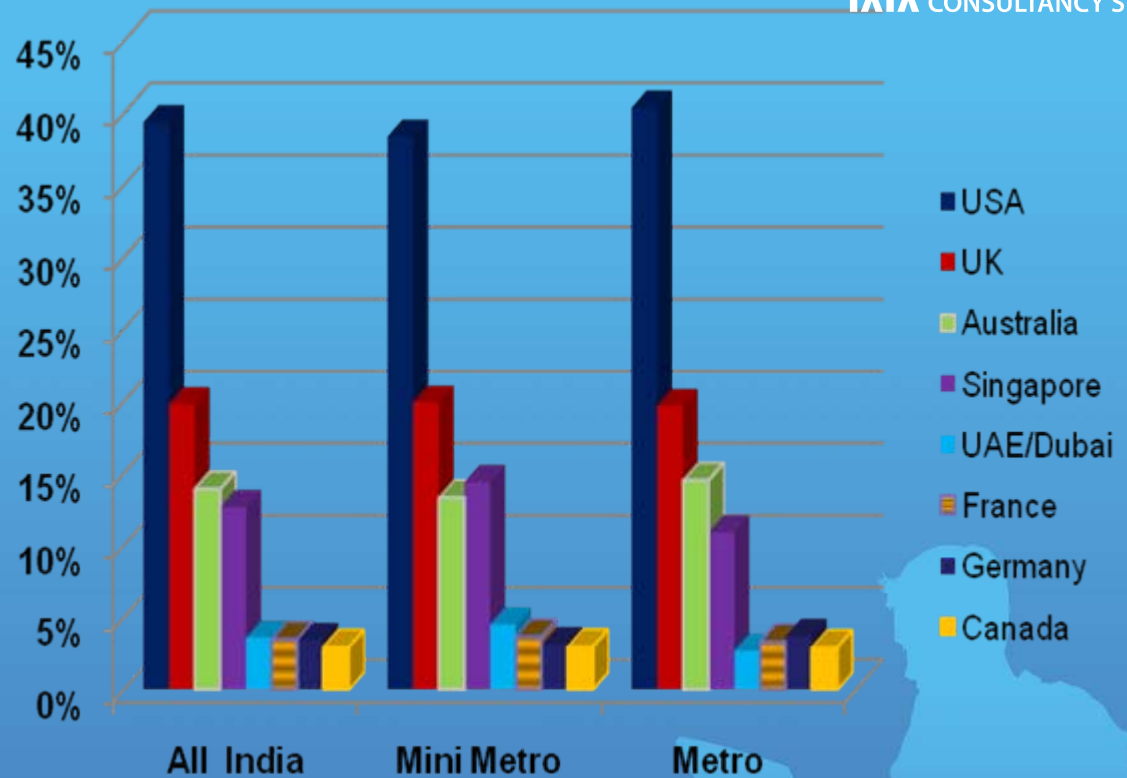


- ❑ High, Uniform awareness of Social Networking
- ❑ Orkut emerges the most preferred source for Social Networking nationally
 - ❑ Mumbai is the only city where Facebook is more popular than Orkut
- ❑ Cochin (8%) and Bangalore (9%) kids are most attracted to Secondlife, Myspace, and Podcasting

Survey Findings

EDUCATIONAL INTERESTS AND PURSUITS

Educational Interest and Pursuits

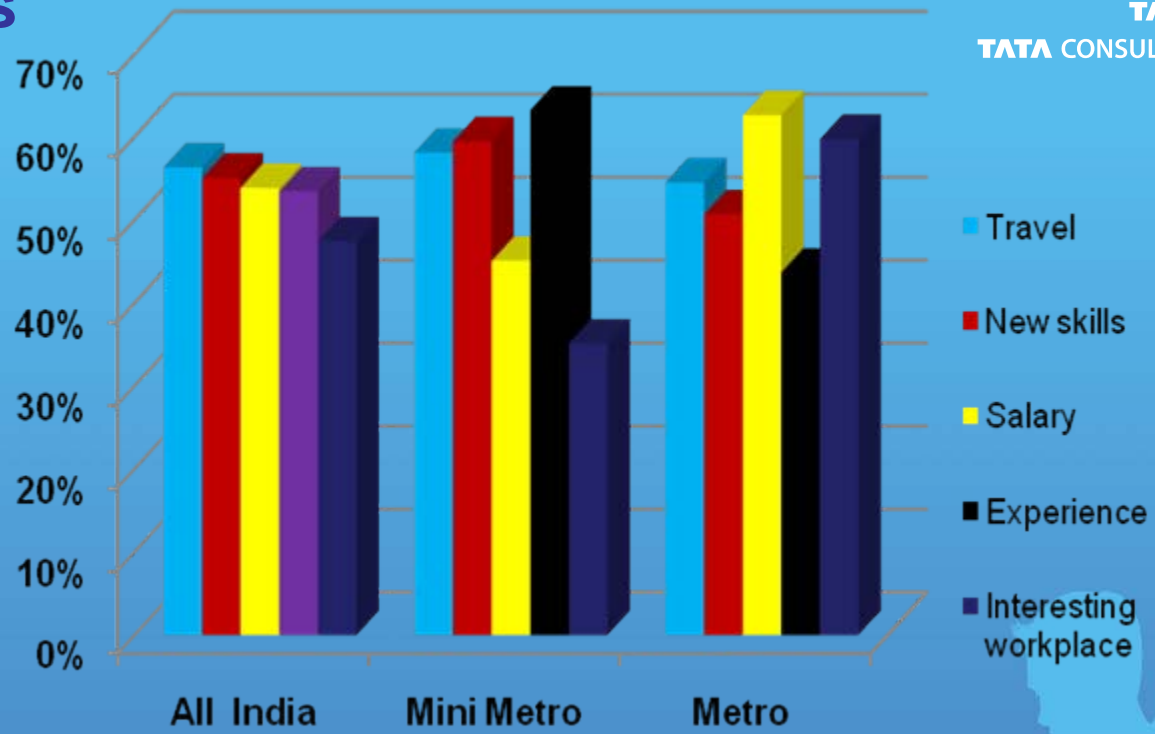


- ❑ Desire to study abroad is a national aspiration among students
- ❑ USA is the most popular destination with nearly 40% preferring to study there
- ❑ Physical proximity, family ties play a role in choice of education destination
 - ❑ Singapore and Dubai is preferred by one in five students in Chennai and Cochin respectively as top choice for overseas education

Survey Findings

CAREER ASPIRATIONS

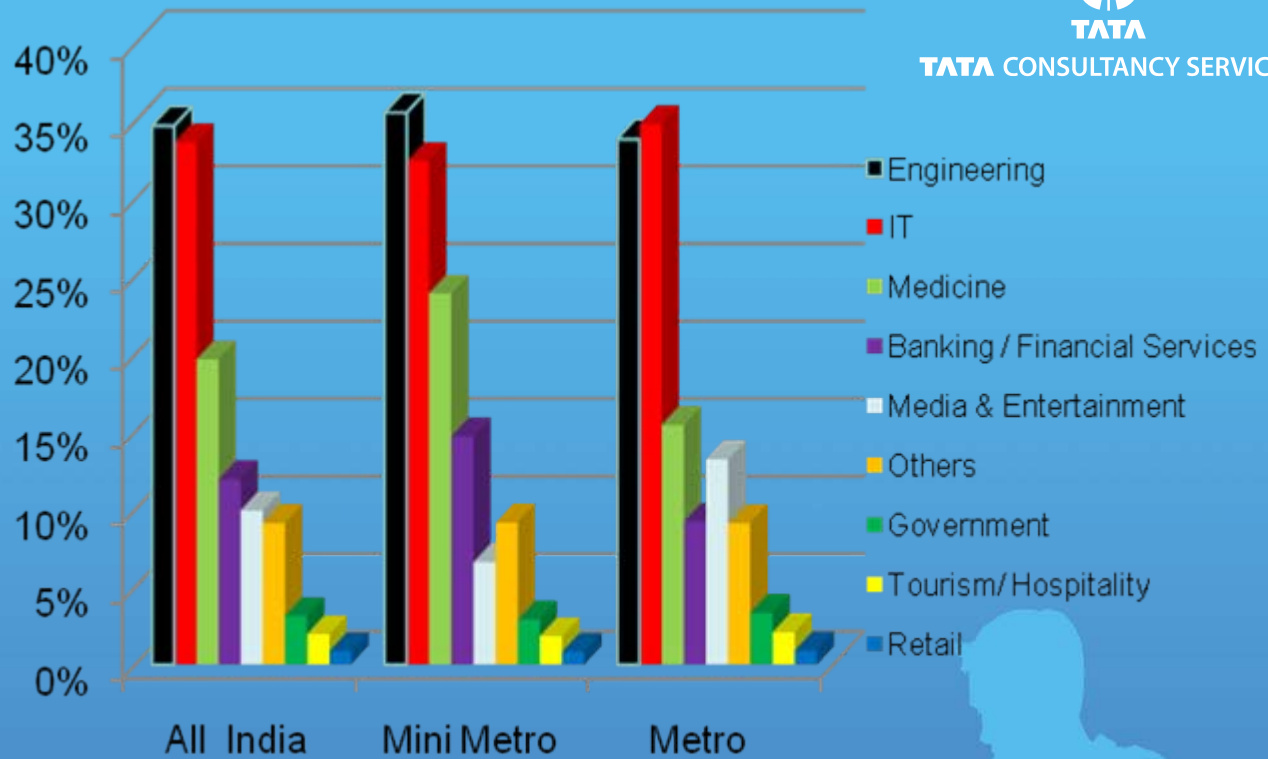
Career aspirations



- Global Citizens: Young India reflects a strong affinity for Travel
- In the Metros, Salary is the highest sought after career expectation
- New Skills and Experience score over Salary in Mini Metros



Career aspirations

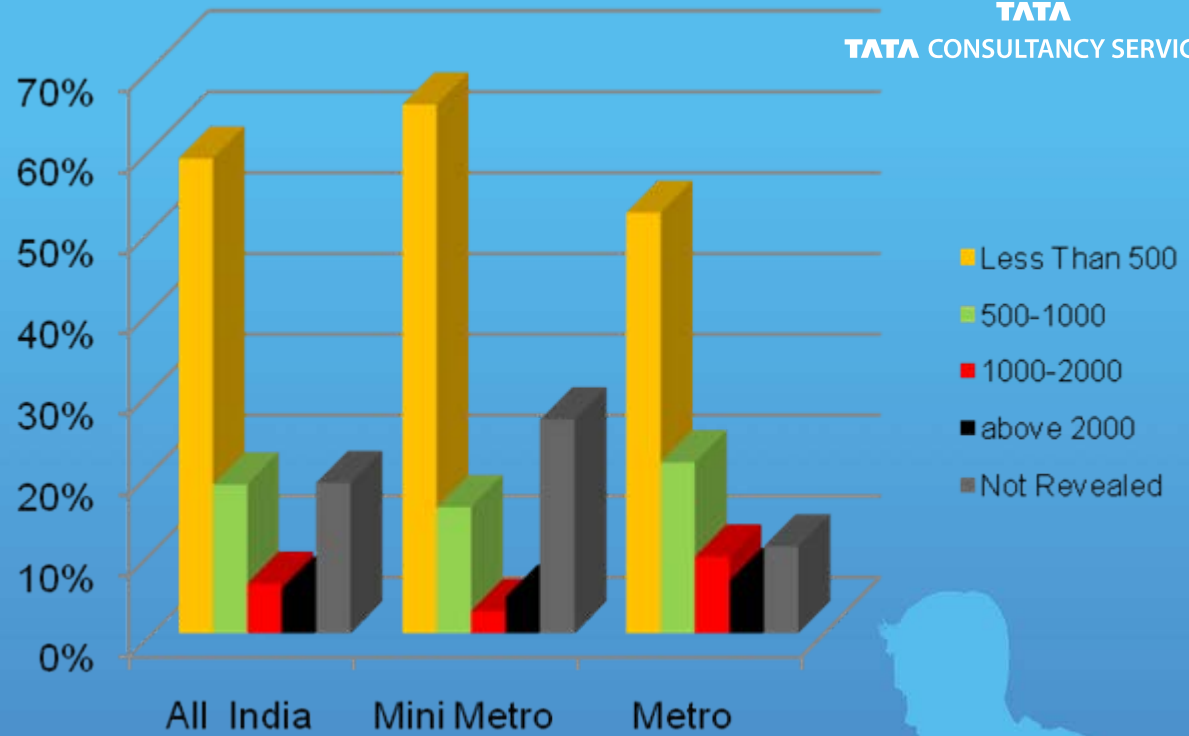


- ❑ Engineering emerged as the most preferred as an Ideal Career Choice (35%)
- ❑ IT is second choice All India; Emerges as the most preferred career in metros
- ❑ Media and Entertainment comes in fourth in metros while the Mini Metros choose Banking / Financial Services over Media

Survey Findings

YOUTH OWNERSHIP TRENDS

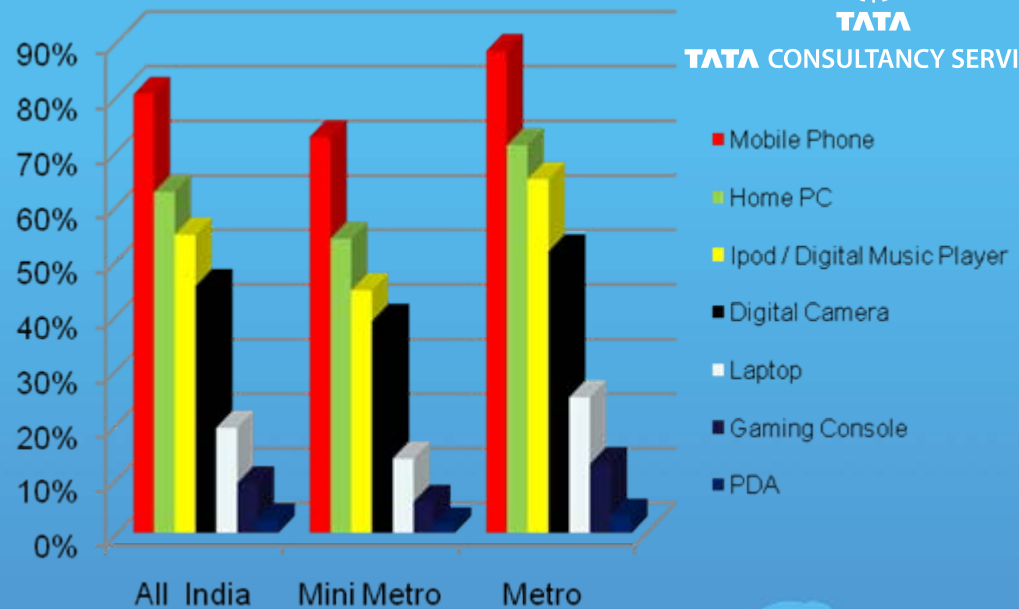
Disposable income



- ❑ Majority get pocket money of less than Rs.500/- per month
 - ❑ Delhi and Hyderabad youth get the highest pocket money (10% of them in both cities get above Rs 2,000 pm) in the country
- ❑ In Metros, 17% receive pocket money in excess of Rs.1000 per month (Mini Metros: 7%)



Youth ownership trends



- ❑ Home PC penetration is very high in the Metros (71%), while it is 54% in the mini metros
 - ❑ Bangalore and Delhi (77%) have highest PC penetration
 - ❑ Among mini metros, Ahmedabad comes close at 73%
- ❑ Laptop, though an aspiration, does not seem to have reached many homes
 - ❑ Mumbai has the highest laptop penetration at 38%, compared to the national average of 19%
- ❑ Ipod's and Music player score over the digital camera both in metros and mini metros
 - ❑ Bangalore has the highest (91%) ipod/ digital music player penetration nationally



So what does Generation Next look like ...



So Who is The Next Generation?

The Globetrotter

- Nomadic
- With global ambitions
- Wants to study and work abroad

Nation builder

- Travel the world but bring experience back to India
- Ultra entrepreneurial
- Future Indian CEO

Gadgetphile

- Defined by gadgets
- Early adopter and user
- Creative user of gadgets

The Social networker

- Communicates with anyone and everyone
- Ignores traditional boundaries
- Start of a new online democracy

