Higher education in India and COVID-19

Impact on admissions

April 2020

home.kpmg/in
The COVID-19 crisis has resulted in India going into an unprecedented nation-wide lockdown in the months of March and April 2020. The effect of the pandemic is being felt across all aspects of the economy with multiple agencies such as Moody’s expecting GDP growth to fall to as low as 2.5 per cent in this calendar year. The Indian government has responded to this by providing several guidelines including restricting movement of people and social distancing.

University Grants Commission (UGC) and other apex education bodies have also issued COVID-19 specific guidelines for Indian higher education institutions (HEIs) resulting in ~1000 universities and ~40,000 colleges temporarily closing, students being asked to go home, and efforts being undertaken to move classes online. These measures will have varying degrees of impact on ~3.75 crore students enrolled in and ~14 lakh faculty employed by the system.

Higher education leaders are also concerned that an extended lockdown due to the pandemic could have a deeper impact for the sector, as COVID-19 has disrupted the current admissions cycle and might have an effect on enrolments, create a cash flow crunch, slow down research and consulting activities.

This year, close to 1.44 crore students are appearing for their school leaving exams and close to 50 lakh of these students will be looking to enrol in a higher education institution in this academic session. Institutions planning for their admissions cycle will need to muster their limited resources, have an agile response plan to COVID-19, and build resilience to minimise the impact on their enrolments, diversity of students, and revenues.
COVID-19 disrupts Indian higher education system, raising concerns among higher education institutions regarding student admissions.

### Key questions regarding student recruitment that higher education leaders, administrators are concerned about

1. **In case there are delays in the national board and competitive exams like JEE, should we focus on changing our student selection mechanisms and criteria?**

2. **In case our scheduled entrance exams cannot be conducted due to unavailability of testing centers, should we create back up plans and switch to online proctored exams?**

3. **When we switch to digital channels, how do we ensure that we are accessible to our prospects in Tier 2 and Tier 3 geographies during the lock-down period?**

4. **How can we improve quality and diversity of our student intake in this scenario? Will we still be able to recruit students from other states and countries?**

5. **If the lock-down period is extended, while current classes are being experimented online, how can we prepare for the next academic session to commence in an online mode?**

6. **Should our fee structure and financial aid offered be altered in this situation to attract talent?**

7. **In case, the next academic session is commenced online, what will be the impact on our top-line and bottom-line, if auxiliary revenue sources (hostel, mess, etc.) are affected?**

8. **What capabilities do we need to develop in the digital domain to help our prospects, future students understand what we have to offer?**

9. **Will there be a drop in student demand for programmes? Which programmes will be the most impacted? Should we withhold plans for launching new programmes this year?**
Impact of the crisis across the student admissions journey

**Awareness and interest**

- **See ads on newspapers**
- **Visit HEI websites and social media pages**
- **Engage on academic forums**
- **Receive emallers and come across digital ads**

**Consideration**

- **Interact with students/alumni**
- **Interact with tele callers**
- **Enquire about financial aid**
- **Complete application process**

**Decision-making**

- **Attend info-sessions**
- **Visit campus, campus tour**
- **Write entrance exam**
- **Attend orientation programme**
- **Avail financial aid**
- **Accept admit**

**Key processes for admissions office:***

- **Launch of targeted admissions campaign**
- **Applications window – lead qualification**
- **Prospect engagement**
- **Evaluation processes and admission list**

**Candidate expectation:** Gain information about various institutions

**Student mindset:** Exploratory, curious

**Candidate expectation:** Interact with institutions and understand potential opportunities

**Student mindset:** Ambitious, aspirational

**Candidate expectation:** Looking forward to joining the institution

**Student mindset:** Excited

**Key processes for admissions office:**

- **Campus/online counselling and provision list**
- **Offer roll-out and student on-boarding**

---

Low impact | Medium impact | High impact
HEIs should innovate on their admissions process to stay ahead of competition

Institutions need to innovate, focus, re-align and respond to the new normal. We suggest

<table>
<thead>
<tr>
<th>Digital first</th>
<th>Use a Digital First approach for targeting and enhancing student experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Targeted campaign</td>
<td>Realign marketing campaigns to focus on geographical strongholds and student segments where brand is well established</td>
</tr>
<tr>
<td>Student experience</td>
<td>Create an engaging student experience as focus is likely to shift to lead conversion from lead generation</td>
</tr>
<tr>
<td>Brand and community engagement</td>
<td>Refine and strengthen brand position through COVID-19 efforts at an institution level – students, parents and other stakeholders will prefer institutions that produces positive social impact</td>
</tr>
<tr>
<td>Communication</td>
<td>Develop content strategy that helps differentiate your offerings in the digital crowd and engage with stakeholders in a clear and consistent manner</td>
</tr>
</tbody>
</table>

We have identified challenges in the various admissions processes and have highlighted the possible mitigation steps that institutions can take

<table>
<thead>
<tr>
<th>Sector issues/challenges</th>
<th>Possible mitigation steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Limited circulation of newspapers and could lead to lower brand awareness</td>
<td>• Switch to alternate channels – gaming apps, news apps, OTT platforms (60 per cent viewership growth expected)</td>
</tr>
<tr>
<td>• Lockdown affecting planned admission campaigns - student recruitment fairs, school outreach</td>
<td>• Position institution as a thought leader in the fight against COVID-19 – release faculty POVs, short term courses; community contribution</td>
</tr>
<tr>
<td>• Digital channels, getting crowded with little differentiation</td>
<td>• Differentiated content – videos, blogs, podcasts – on-board students as part time content creators</td>
</tr>
<tr>
<td>• Lower bandwidth of agents has resulted in drop in offline applications</td>
<td>• Roll-out ‘Refer – a – Scholar’ programs using existing network (student, faculty, alumni)</td>
</tr>
<tr>
<td>• Regional and international diversity affected - students reconsidering migration for education</td>
<td>• Run targeted campaign focussing on strategically important segments (based on geography or student persona) –</td>
</tr>
<tr>
<td>• Economic slowdown may cause students to rethink investing in post-graduate (PG) courses – student talent pool impacted</td>
<td>• Build communication campaigns highlighting institution’s value proposition and offerings</td>
</tr>
<tr>
<td>• Applications window – lead qualification</td>
<td>• Target students reconsidering international PG opportunities</td>
</tr>
</tbody>
</table>
### Sector issues/challenges

- Social distancing, physical restrictions make it **unfeasible to conduct campus tours, info-sessions**
- Inability to reach schools to conduct counselling sessions
- Lower bandwidth of outbound tele calling agencies owing to reasons such as remote working conditions
- Timelines unclear: Board exams, IITJEE, NEET, postponed – shorter window for student selection
- Entrance exam centres impacted
- Processes requiring physical presence (GD/PI) not feasible
- Bandwidth and reach of chosen digital exam providers to cater to right target audience
- Lack of guidelines/regulations on provisional offers
- Limited or no physical presence of candidate for on-campus counselling
- Institutions that have already rolled out admission offers, orientation programs may be impacted
- Huge lead time to join will create additional drop-outs
- Govt. mulling alternate academic calendar for 2020-21

### Possible mitigation steps

- **AR/VR** based virtual campus tours
- Leverage digital channels – webinars on key institution value propositions
- Personalised counselling through chat apps
- Promote student campus ambassadors on social networks
- **Given that courses are online, allow prospective students to audit courses**
- Leverage alumni to engage with prospects
- Allow students to attempt **mock exams**
- Leverage online proctoring services to enable students to take exams from home
- Switch to online video conferencing platforms for personal interviews
- Explore **alternate evaluation processes** – SOPs, extra-curricular portfolio, group discussions, online interviews, etc.
- **Online counselling** for seat-allocation
- Personalised counselling to students to help match aspirations (shift in choices, preference in a agile manner)
- Webinars with experts to clear doubts and help in decision-making process
- Prepare online content to help fresh admits understand and navigate facilities and opportunities available on campus
- Campus ambassadors to lead groups on social media platforms to keep admitted students engaged
- 6-week online course to engage provisional students and prepare for enrolment

---

**Prospect engagement**

**Evaluation processes and admission list**

**Campus/online counselling and provision list**

**Offer roll-out and student on-boarding**

---

Student experience and engagement is crucial to ‘success’ of admissions this year.
HEIs need to build a 100 day response plan

Key pointers, as you prepare a response plan for this year...

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Measure HEI’s digital footprint using tools such as sentiment analysis, social share of voice (SSoV), engagement rate before launching new digital campaigns</td>
</tr>
<tr>
<td>2</td>
<td>Do a quick assessment of your partner eco-system and their ability to deliver to your needs – digital marketing firms, PR firms, assessment partners, CRM vendor, telemarketing agencies, etc. – and on-board partners in required areas</td>
</tr>
<tr>
<td>3</td>
<td>Do a quick evaluation of technology and student engagement platforms to leverage on their functionalities – applications portal, CRM, online counselling platforms, platforms for conducting webinars, student interviews and discussions - identify capabilities that needed to be strengthened</td>
</tr>
<tr>
<td>4</td>
<td>Focus on capacity building for your key teams - conduct training for admissions staff and faculty on new admissions methods, working collaboratively from remote locations, the need to be empathetic to students’ needs</td>
</tr>
<tr>
<td>5</td>
<td>Assess readiness of digital content - encourage students and faculty to share content on academics, research, campus life and experiences for various campaigns</td>
</tr>
<tr>
<td>6</td>
<td>Stay engaged with students (current and prospective) - roll out surveys, conduct FGDs with prospective students to understand concerns, challenges and expectations. Proactively communicate to provide clarity and assuage concerns</td>
</tr>
<tr>
<td>7</td>
<td>Develop clear guidelines, protocols and policies with respect to offer roll out and student onboarding to ensure hassle free student experience and quick turnaround</td>
</tr>
<tr>
<td>8</td>
<td>Focus on lead generation and conversion interventions in the 100 day plan and include risk mitigation measures and contingency plans.</td>
</tr>
<tr>
<td>9</td>
<td>Develop scenarios to assess impact of COVID-19 on enrolments, cash flows, expansion plans and identify alternate options, mitigation plans for this year</td>
</tr>
</tbody>
</table>
1. India may escape a recession, but coronavirus will slow down growth further, Quartz, Pramod Mathew, March 30 2020
2. All India Survey on Higher Education, accessed 03 April 2020
4. KPMG in India analysis 2020
6. The world is turning to video games amid coronavirus outbreak, Yahoo Finance, Daniel Howley, 18 March 2020
7. Streaming At Home May Rise 60% Based On Previous Crises: Nielsen, Deadline, Jill Goldsmith, 16 March 2020
8. How is the Spread of the Coronavirus Impacting Prospective International Students?, QS, Sarah Linney, accessed 03 April 2020
9. Important test delivery information pertaining to COVID-19 (coronavirus), Pearson Vue, accessed 03 April 2020
11. Coronavirus Impact on GMAT Testing, Business Because, accessed 03 April 2020
Acknowledgements

Authors
Narayanan Ramaswamy
Madhavan Vilvarayanallur
Manigandan Ganesan
Mohammad Saquib Aslam
Subadra Kalyanaraman
Shaneela Kanumilli
Shriram Srinivasan

Markets and strategy
Nisha Fernandes
Deboleena Thakur
Shveta Pednekar
Rasesh Gajjar
The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavour to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act on such information without appropriate professional advice after a thorough examination of the particular situation.

© 2020 KPMG, an Indian Registered Partnership and a member firm of the KPMG network of independent member firms affiliated with KPMG International Cooperative (“KPMG International”), a Swiss entity. All rights reserved.

The KPMG name and logo are registered trademarks or trademarks of KPMG International.

This document is for e-communication only. (004_BRO0420_RG_SP)