KPMG

Higher education in India and COVID-19

Impact on admissions

April 2020

home.kpmg/in

# COVID-19 disrupts Indian higher education system...

Impact of COVID-19 on higher education in India

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[1] 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**[2] 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**[2] 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, slowdown research and consulting activities.

This year, close to **1.44 crore students**[3] are appearing for their school leaving exams and close to **50 lakh**[4] 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.**
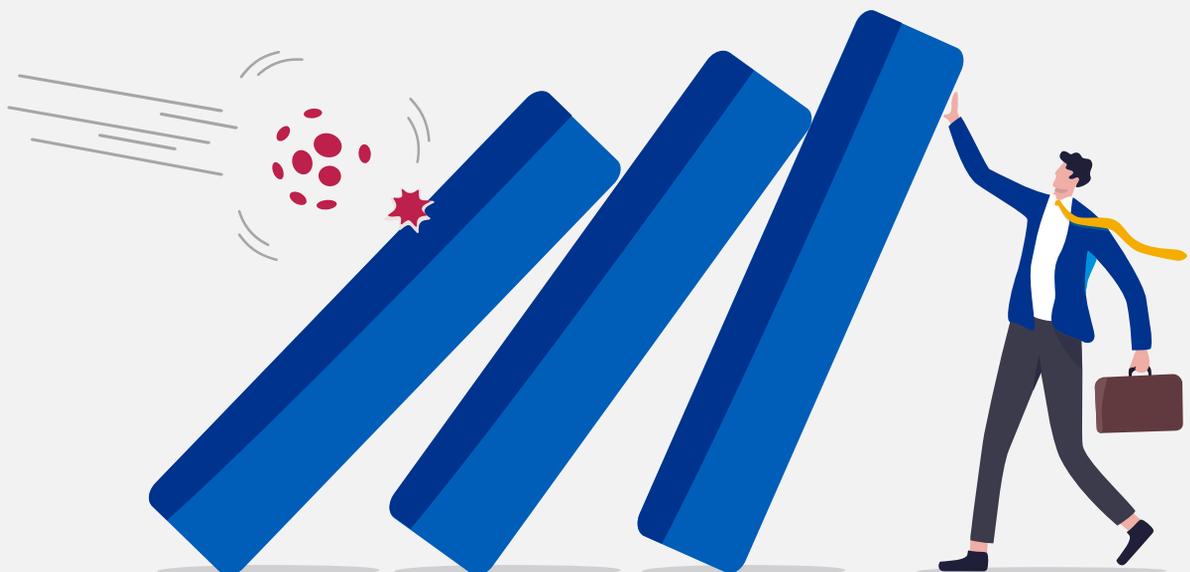
...raising concerns among higher education institutions regarding student admissions

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

Oct 2019 – Apr 2020

Awareness and interest

- See ads on newspapers
- Interact with students/ alumni
- Visit HEI websites and social media pages
- Interact with family, peers
- Engage on academic forums
- Receive emailers and come across digital ads
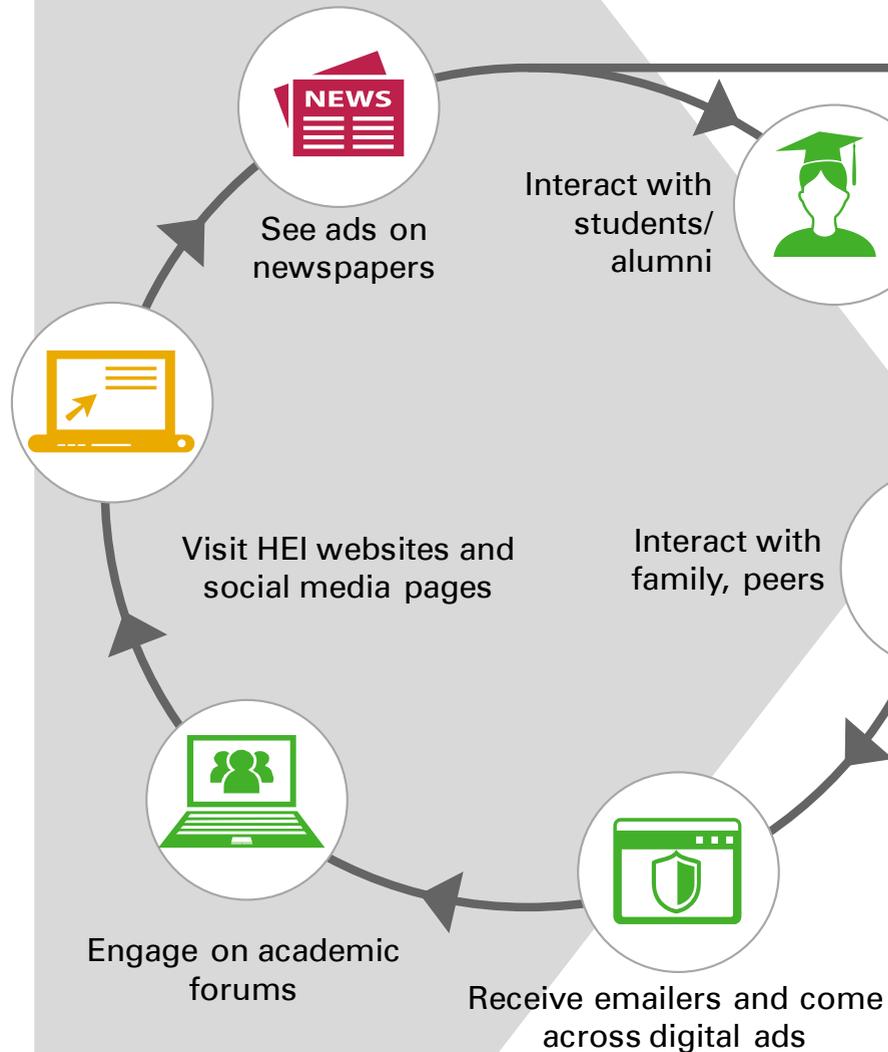
Candidate expectation: Gain information about various institutions

Student mindset: Exploratory, curious

Key processes for admissions office:

- **Launch of targeted admissions campaign**

Apr 2020 – May 2020

Consideration

- Interact with tele callers
- Attend info-sessions
- Enquire about financial aid
- Visit campus, campus tour
- Complete application process
- Write entrance exam
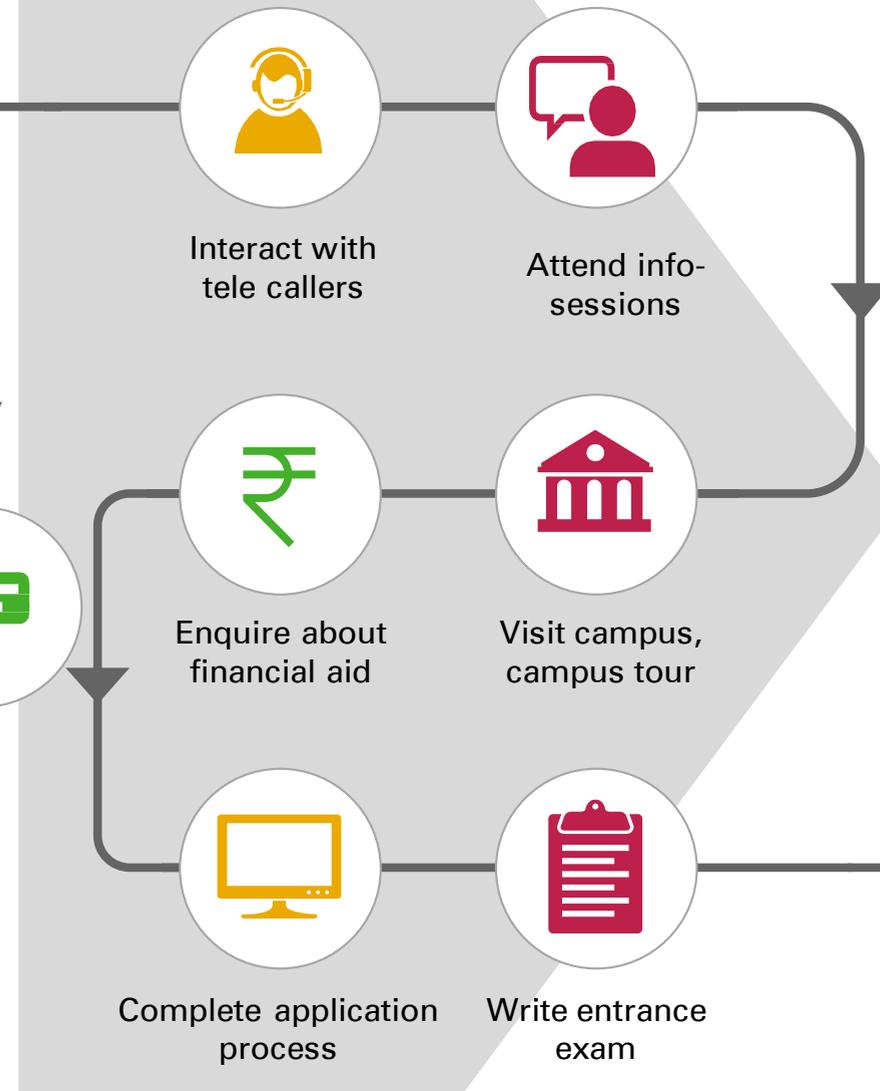
Candidate expectation: Interact with institutions and understand potential opportunities

Student Mindset: Ambitious, aspirational

Key processes for admissions office:

- **Applications window – lead qualification**
- **Prospect engagement**
- **Evaluation processes and admission list**

Jun 2020 – Aug 2020

Decision-making

- Interact with new classmates
- Move-in to residential facilities
- Attend orientation programme
- Avail financial aid
- Accept admit
- Receive offer
- Attend counselling/ seat allocation process
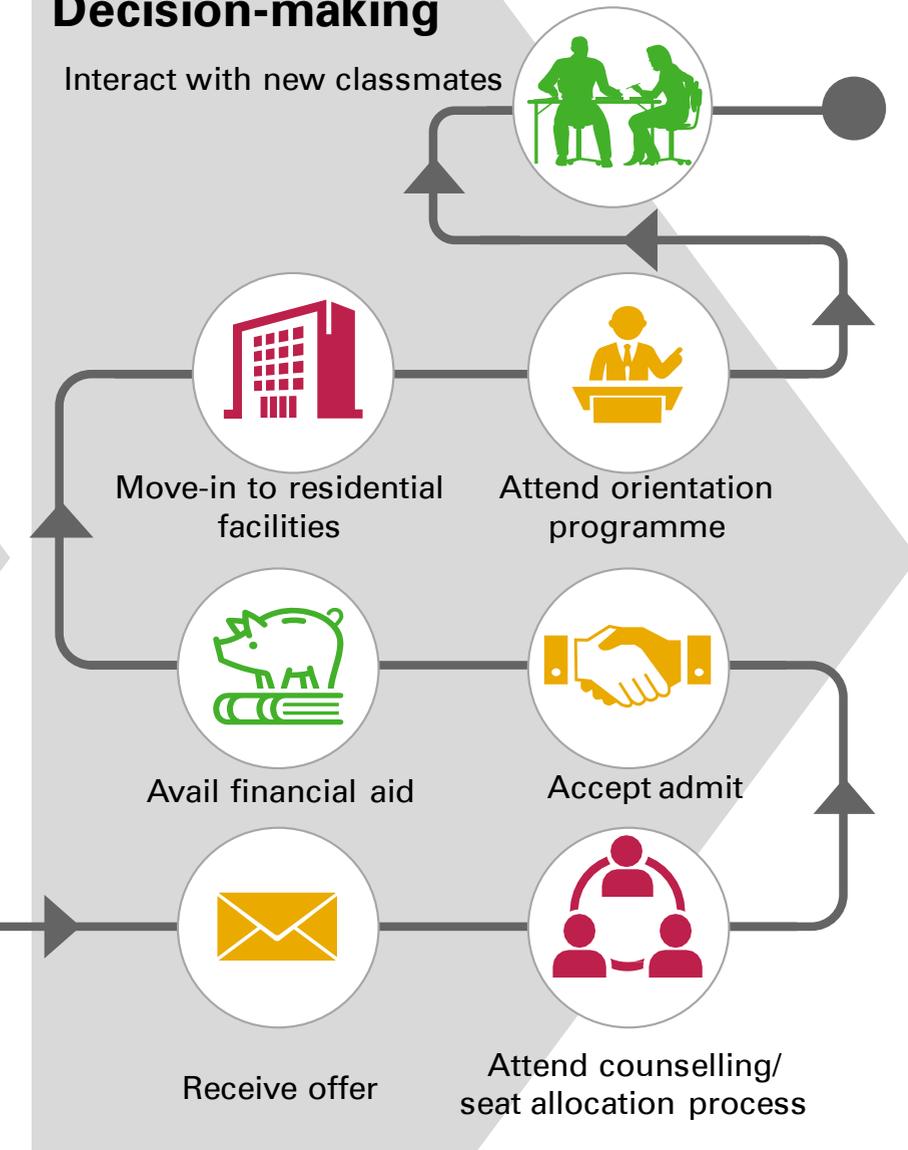
Candidate expectation: Looking forward to joining the institution

Student Mindset: Excited

Key processes for admissions office:

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

Legend:
- 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

|	
Digital first	Use a Digital First approach for targeting and enhancing student experience
Targeted campaign	Realign marketing campaigns to focus on geographical strongholds and student segments where brand is well established
Student experience	Create an engaging student experience as focus is likely to shift to lead conversion from lead generation
Brand and community engagement	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
Communication	Develop content strategy that helps differentiate your offerings in the digital crowd and engage with stakeholders in a clear and consistent manner

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

	Sector issues/challenges	Possible mitigation steps
Admissions campaign – lead generation	• **Limited circulation of newspapers** and could lead to lower brand awareness[5] • Lockdown affecting planned admission campaigns - student recruitment fairs, school outreach • **Digital channels, getting crowded** with little differentiation	• Switch to alternate channels – **gaming apps**[6], **news apps, OTT platforms**[7] **(60 per cent viewership growth expected)** • **Position institution as a thought leader in the fight against COVID-19 –** release faculty POVs, short term courses; community contribution • **Differentiated content** –videos, blogs, podcasts – **on-board students as part time content creators**
Applications window – lead qualification	• **Lower bandwidth of agents** has resulted in drop in offline applications • **Regional and international diversity affected** - students reconsidering migration for education[8] • Economic slowdown may cause **students to rethink investing in post-graduate (PG) courses** – student talent pool impacted	• **Roll-out 'Refer – a – Scholar' programs using existing network (student, faculty, alumni)** • Run targeted campaign focussing on strategically important segments (based on geography or student persona) – • Build communication campaigns highlighting institution's value proposition and offerings • **Target students reconsidering international PG opportunities**

Student experience and engagement is crucial to 'success' of admissions this year

	Sector issues/challenges	Possible mitigation steps
Prospect engagement	• 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	• **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
Evaluation processes and admission list	• **Timelines unclear**: Board exams, IITJEE, NEET, postponed – shorter window for student selection • **Entrance exam centres impacted**[9,10,11] • Processes requiring physical presence (GD/PI) not feasible • Bandwidth and reach of chosen digital exam providers to cater to right target audience	• 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.
Campus/online counselling and provision list	• Lack of guidelines/regulations on provisional offers • Limited or no physical presence of candidate for on-campus counselling	• **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
Offer roll-out and student on-boarding	• 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	• 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

HEIs need to build a 100 day response plan

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

1 Measure HEI's digital footprint using tools such as sentiment analysis, social share of voice (SSoV), engagement rate before launching new digital campaigns

2 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

3 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

4 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

5 Assess readiness of digital content - encourage students and faculty to share content on academics, research, campus life and experiences for various campaigns

6 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

7 Develop clear guidelines, protocols and policies with respect to offer roll out and student onboarding to ensure hassle free student experience and quick turnaround

8 Focus on lead generation and conversion interventions in the 100 day plan and include risk mitigation measures and contingency plans.

9 Develop scenarios to assess impact of COVID-19 on enrolments, cash flows , expansion plans and identify alternate options, mitigation plans for this year

References

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

3. Board Examinations 2020: Over 1 crore students appeared for 12th, Entrancezone.com, Abhinandan Singh, 13 March 2020

4. KPMG in India analysis 2020

5. Covid-19 hits print media hard — ads and circulation dip, editions see major digital push, The Print, Amrita Nayak Dutta, 27 March 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

10. Graduate School Admissions Processes Affected by COVID-19, The Harvard Crimson, James S. Bikales and Kevin R. Chen, 23 March 2020

11. Coronavirus Impact on GMAT Testing, Business Because, accessed 03 April 2020

12. Modi govt wants CBSE, NCERT, colleges to revise academic calendar due to Covid-19 lockdown, The Print, Kritika Sharma, 25 March 2020
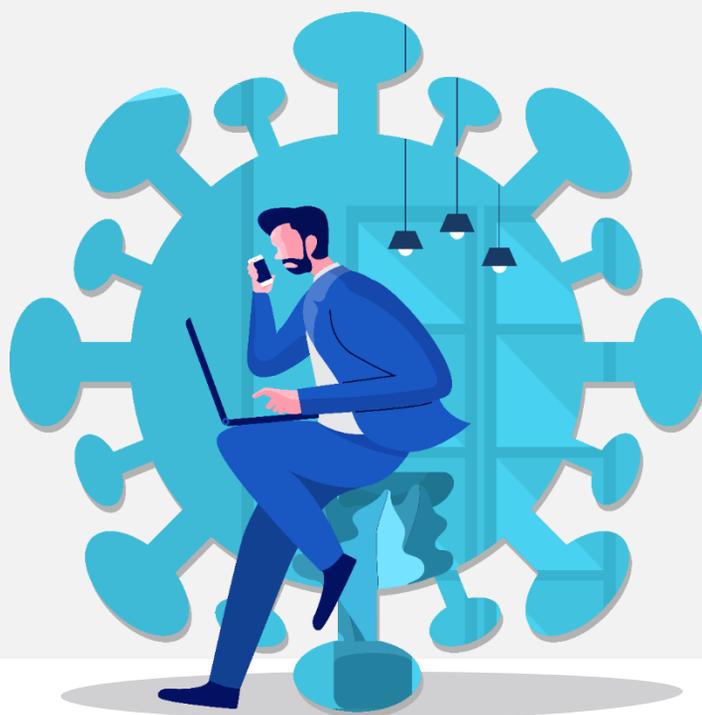
Acknowledgements

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
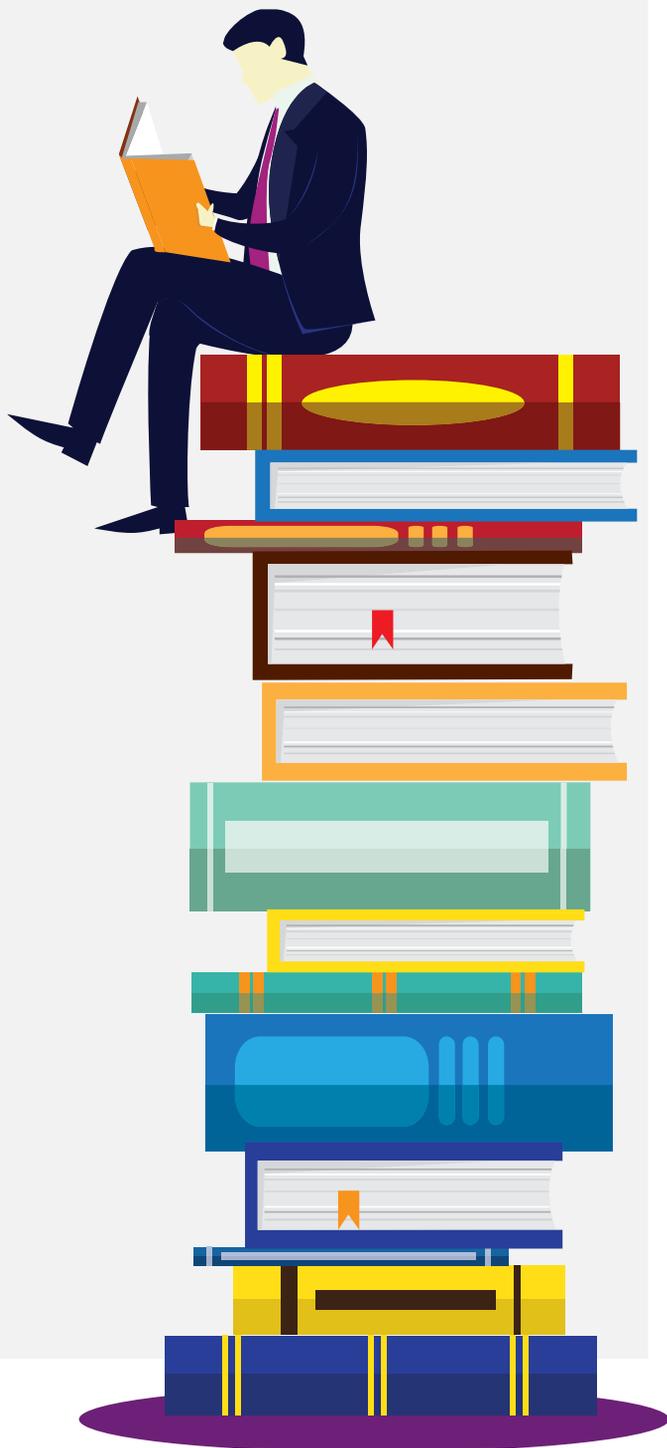
KPMG in India contacts:

Narayanan Ramaswamy
Partner and Head
Education and Skill Development
T: + 91 98400 78242
E: narayananr@kpmg.com

Madhavan Vilvarayanallur
Partner
Education and Skill Development
T: + 91 97910 39872
E: vmadhavan@kpmg.com

Debabrata Ghosh
Director
Education and Skill Development
T: + 91 98919 06053
E: debabrata@kpmg.com

home.kpmg/in

#KPMG josh

home.kpmg/in/socialmedia