

K-12 education during COVID-19

Challenging times
for Mexico, Colombia
and Peru



Background



In April and May 2020, EY-Parthenon surveyed 9,500 parents of K-12 students in Mexico, Colombia and Peru to understand the impact school closures had on their children's education and how COVID-19 could change the future of K-12 schools in these countries. The results revealed key challenges to accessing technology to take online classes and a major impact on personal finances, thus affecting school enrollment and revenues.

Due to COVID-19, K-12 students in Mexico, Colombia and Peru had to continue the academic year remotely; schools and governments took alternative approaches to support student learning, from virtual classes to televised and radio lessons.

In Peru, where the academic year begins in March, schools had to quickly adapt for the beginning of classes. In mid-March in Colombia, schools closed and have not resumed classes. Some private schools, part of the "Federación de Directivos Docentes de Colombia," or Private School Federation, believe they will not be able open schools in August. Colombian schools use two different calendars: in Calendar A, the school year begins at the end of January and finishes in November; with the Calendar B schedule, the year begins in early September and concludes in June. In Mexico, where the school calendar runs from late August to early July, classes were canceled on

March 20; however, many schools initially believed closures were temporary and classes would resume after spring break, delaying remote action plans.

As education regulators dictate the way going forward, we will continue to understand how the health crisis is impacting the K-12 education sector of Latin-American countries. We will launch additional surveys, as required, to understand evolving parent and student experiences with school closures. Due to the uncertainty, we believe schools that are flexible and can quickly adapt will be able to capitalize on opportunities for growth.

K-12 education during COVID-19: challenging times for Mexico, Colombia and Peru

Due to COVID-19, a generation of students who grew up in the digital world have had to continue their education remotely, using these digital resources. K-12 students in Mexico, Colombia and Peru have taken different approaches to access education during confinement. The response across countries has been to temporarily close schools; however, there still remains uncertainty as to how K-12 education will continue going forward.

EY-Parthenon conducted a deep dive on Mexican, Colombian and Peruvian parents of K-12 students through several surveys with a total of 9,500 respondents. Our team sought

to understand the impact school closures had on their students' education and how COVID-19 could change the future of K-12 schools in these countries.

Note on Methodology

EY-Parthenon conducted online parent surveys in Mexico, Colombia and Peru from April 8 through May 8. n=9,500

What's happening now in K-12 education?

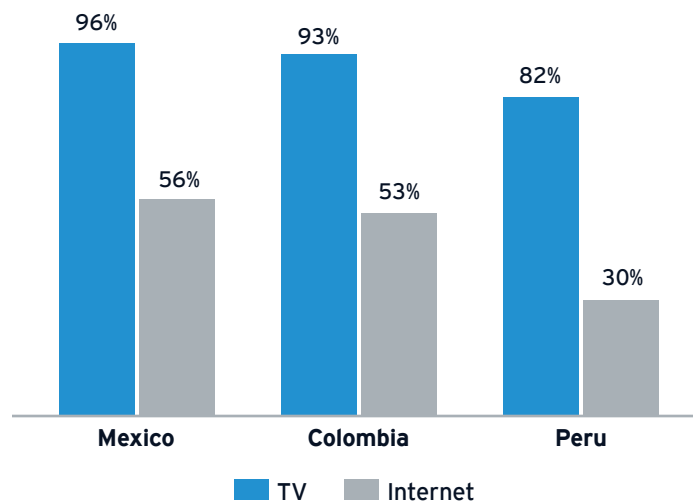
During these past weeks, the schools' response has been varied, and parents and students have experienced the following:

1. Access to education through different channels:

Most students enrolled in private schools have the required technology infrastructure to take virtual classes at home. However, even some students who attend the most premium schools do not have sufficient technology at home.

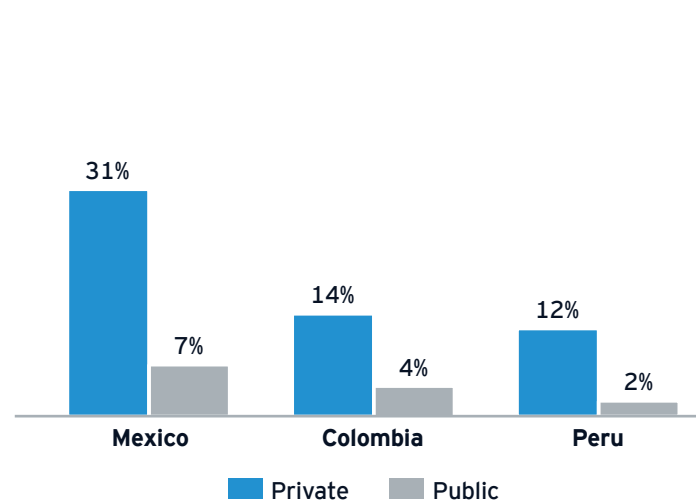
For example, one of the most expensive private schools in Mexico City surveyed its student body and found that only 85% of respondents met all the requirements to take online classes. Students enrolled in public schools are even less likely to be prepared for virtual classes, as the percentage of such students who have access to the internet or devices at home is even smaller. The lack of adequate infrastructure has made state-sponsored televised and radio education an alternative approach for remote learning.

Figure 1: Access to TV and internet service by country (Macro data by country)



Notes: 2018 data for Peru and Colombia, 2019 for Mexico. Sources: INEGI (Mexico), DANE (Colombia) and INEI (Peru)

Figure 2: Does your child share a computer or tablet? (% of respondents who have their own computer or tablet)



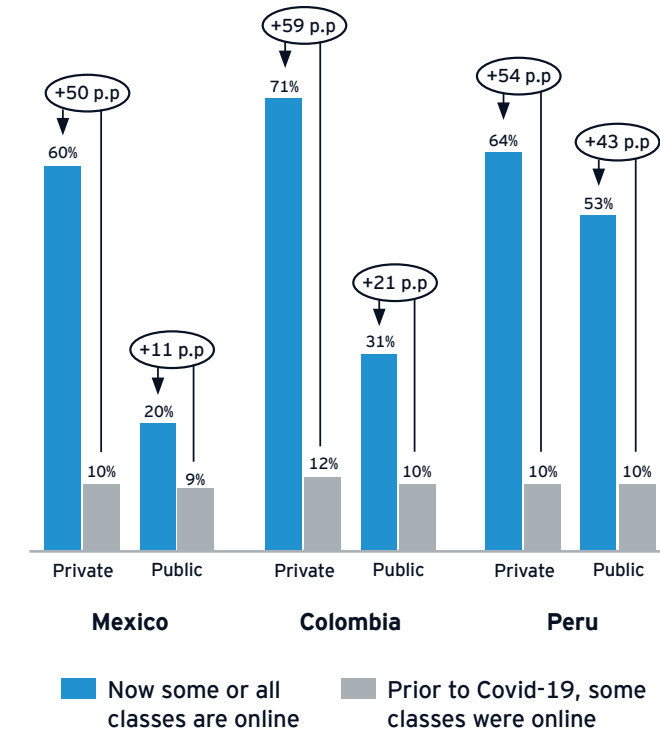
Notes: EY-Parthenon digital surveys; Mexico (n=1,551); Colombia (n=2,193); Peru (n=2,257)

2. Private schools are leading the effort to switch online:

In Mexico and Colombia, more than half of parents whose children were enrolled in private schools reported that their children's schools continued classes online during school closures, compared with only around 20% of parents of students enrolled in public schools. According to survey results, more than half of public and private schools migrated to online solutions in Peru. Additionally, few schools had to cancel classes; 22% of parents in Mexico declared that classes were canceled in their kids' schools, compared with 19% of those in Colombia and 6% of those in Peru. The response of these schools included:

► **Shift to remote learning or canceled classes:** Across the three countries, the number of private school students taking some or all classes online greatly outpaces those from public schools. The only exception is Peru, where 53% of parents with children enrolled in public schools reported having some or all of their children's classes online compared with 64% of private school students.

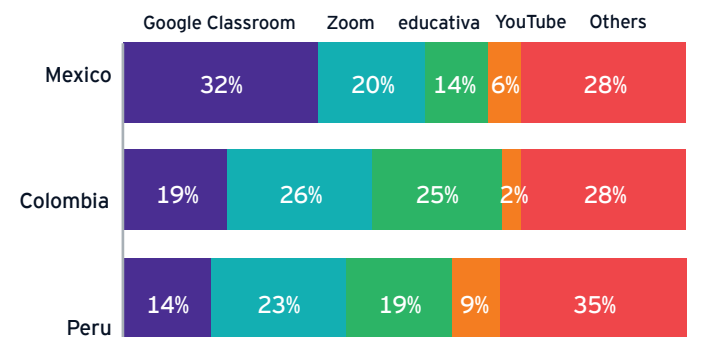
Figure 3: Online classes before and during confinement (Questions = "Before confinement, how did your child use online platforms?" and "With confinement, how did your child's education change?")



Notes: EY-Parthenon digital surveys; Mexico (n=1,078); Colombia (n=2,162); Peru (n=3,123)

► **Adoption of free platforms for private schools:** Most schools that switched to online education adopted free platforms. Google Classroom and Zoom searches peaked during the last weeks, as they became the primary alternatives to delivering instruction. Free platforms are currently the most-used platforms in the three countries. More than 50% of parents in Mexico said their children use Google Classroom and Zoom. In Colombia and Peru, 45% and 37% of parents, respectively, reported that their children use Google Classroom and Zoom.

Figure 4: Online platform usage by students for online classes (Question = "Please select the online platform your kid uses for online classes")



Notes: EY-Parthenon Digital Surveys; Mexico (n=424); Colombia (n=728); Peru (n=1,146)



► **Alternative methods to reach K-12 students:** Reaching households without access to the internet and computers is a challenge in these countries. Governments have offered alternative ways to continue learning, including TV and radio. In Peru, there was an estimated ~800k TV views for education-based programs only on the first day of “TV classes.” The TV platform provided by the government, “Aprendo en Casa,” has 1.8 million unique users registered – almost one-fourth of all K-12 students. Data on the usage of alternative technologies in Mexico and Colombia is not available. A third of parents in Mexico mentioned their kids’ school canceled classes, as did one-fourth of parents in Colombia.

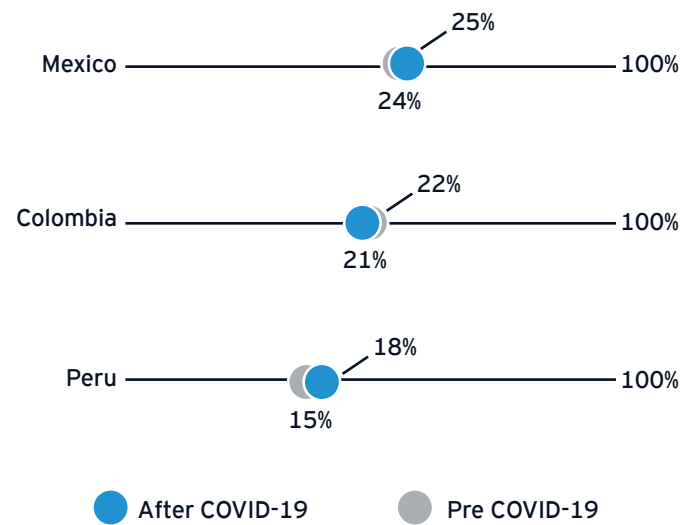
3. **Parents in all three countries look for similar attributes in online education:** Parents have not changed their perception of online education, but they appreciate remote learning as a temporary solution. However, there are some key characteristics that parents like and dislike about this type of education. By using the parent surveys, we identified several perceptions about online education:

Figure 5: Technology used by countries to provide classes to K-12 students

	Internet	Mobile	TV	Radio	Others
Mexico	✓		✓	✓	✓
Colombia	✓		✓	✓	✓
Peru	✓	✓	✓	✓	

Source: World Bank; EY-Parthenon analysis

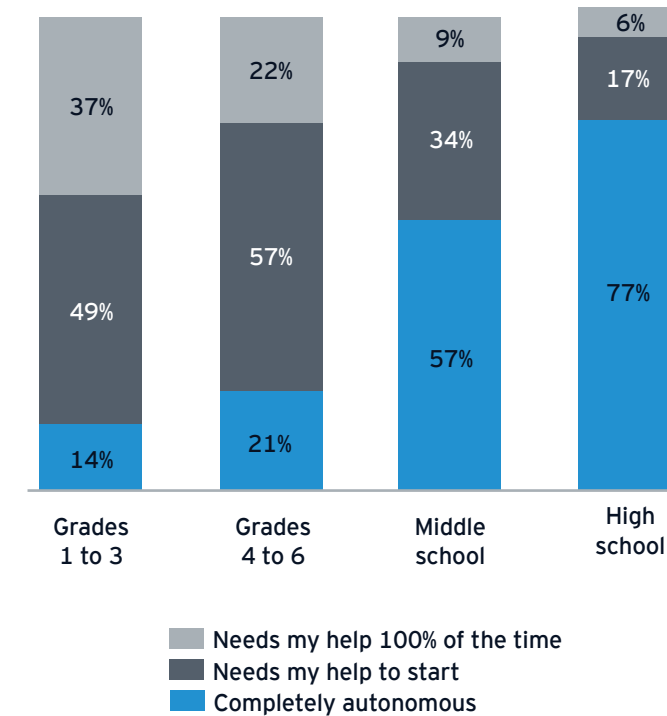
Figure 6: Do you find online classes attractive? (% respondents who answered “yes”)



Notes: EY-Parthenon digital surveys; Mexico (n=1,526); Colombia (n=2,162); Peru (n=2,221)

► **Key concern regarding the level of autonomy:** Around 70% of parents in Colombia and Peru reported spending more time involved in their children’s education during confinement, while only 57% of Mexican parents shared the same sentiment. The level of autonomy highly depends on the grade, as first-to-third-graders have lower levels of autonomy than high school students. Parents with younger kids need to provide more attention and support.

Figure 7: How autonomous is your kid while taking online classes? (Percentage of respondents)



Notes: EY-Parthenon Digital Surveys; Mexico (n=1,125); Colombia (n=1,620); Peru (n=1,943)



70% of parents in Colombia and Peru, and 57% of parents in Mexico, mention they spend more time on their children’s education

► **Limited commuting required and technological skills are appreciated by parents:** Parents value that remote learning does not require commuting; they also view it as an opportunity for their kids to develop technological skills and independence.

► **However, lack of teamwork and unproductive class time are key concerns:** Parents do not like the lack of interaction with classmates and teachers and the amount of time spent in front of screens. Around 47% of parents believe that teamwork skills have deteriorated due to remote learning; similarly, almost half of parents believe that relationships with classmates have worsened due to confinement. Moreover, 46% of parents believe class time has become less productive since moving online. This perception could be driven by parents' recognition of their children's short attention spans; according to a study by the University of Carnegie Mellon (2013), the attention span for K-12 students is around 15 minutes. Online classes should therefore be shorter and consist of specific tasks.



4. **Parents are unwilling to continue paying for the same tuition level:** As mentioned earlier, parents believe certain aspects of education have worsened, and currently most households have been financially affected. In a consumer sentiment survey conducted by EY-Parthenon during April 2020, 91% of Mexicans declared they have seen a negative impact on their salaries, and even more shocking is that 64% of them have seen their incomes decrease by at least 60%. Parents are coping with the new economic reality through two ways:

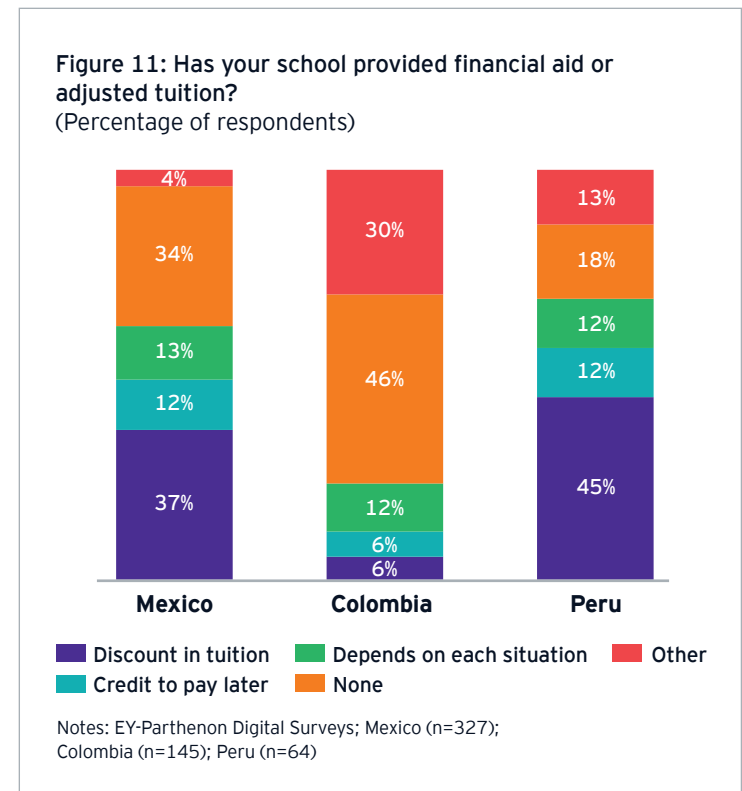
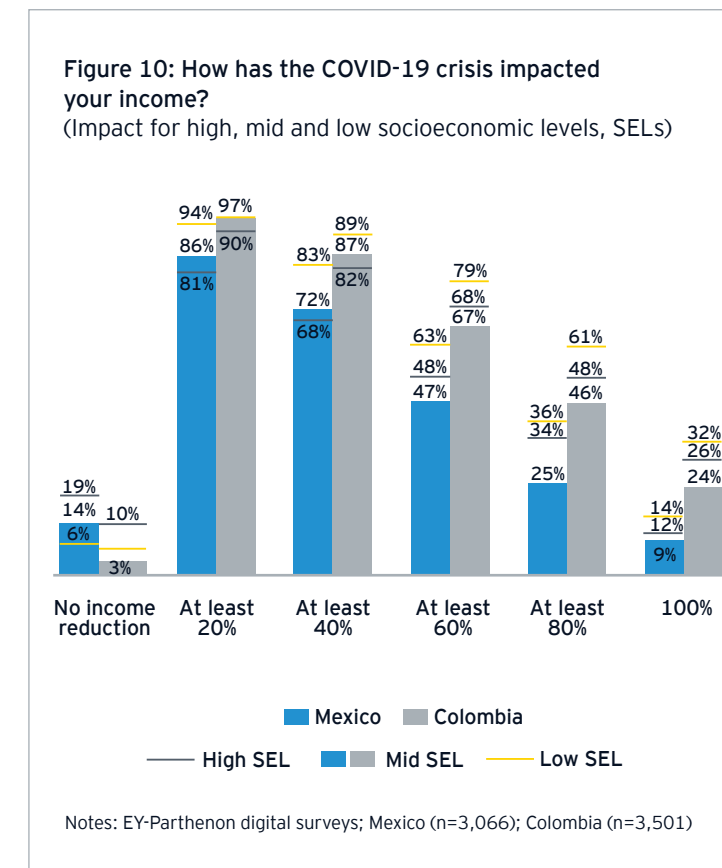
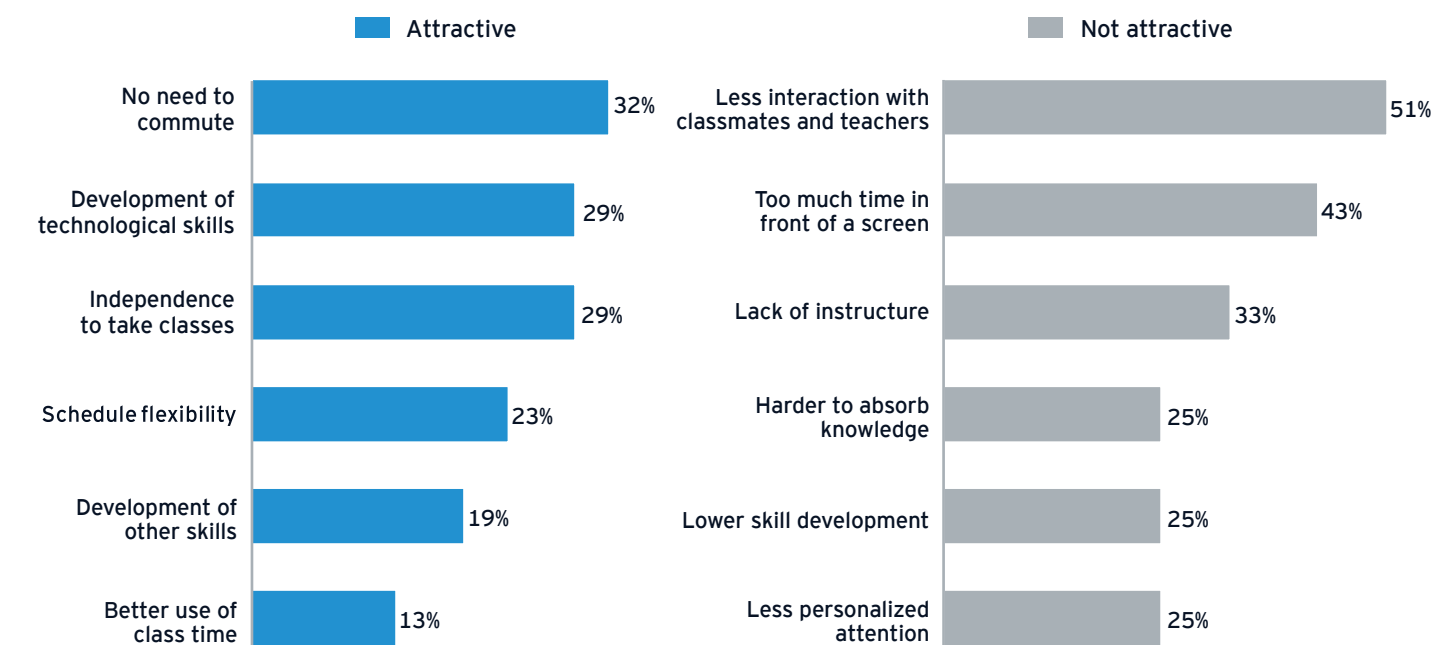


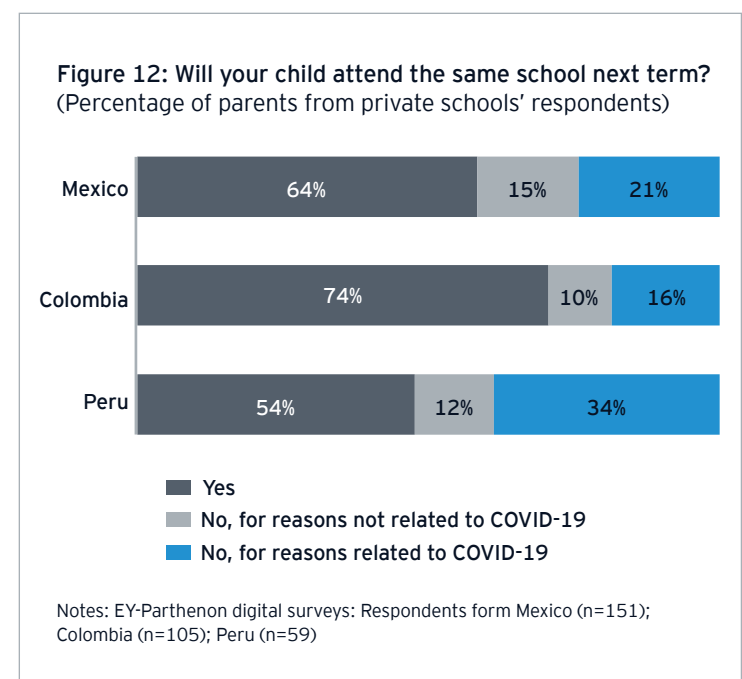
Figure 8: What do you find attractive/not attractive in online education?
(Parents from Mexico, Colombia and Peru)



Notes: EY-Parthenon Digital Surveys; Mexico (n=1,074); Colombia (n=1,818); Peru (n=1,807)

► **Flexible terms and tuition discounts:** Some parents are asking for tuition discounts or adjustments, and schools in Mexico and Peru have offered the most flexibility. In Mexico, of the respondents who stated that their school was offering a tuition discount, 49% are receiving a discount of more than 15%. In Peru, of the parents that stated that their school was offering a tuition discount, 73% are receiving a discount of more than 15%.

► **Changing to more affordable schools:** In Peru, 34% of parents have considered changing their child's school, as have 21% of Mexican parents. The ministries of education in Colombia and Peru are facilitating the move from private to public schools for those students who can no longer afford private education.



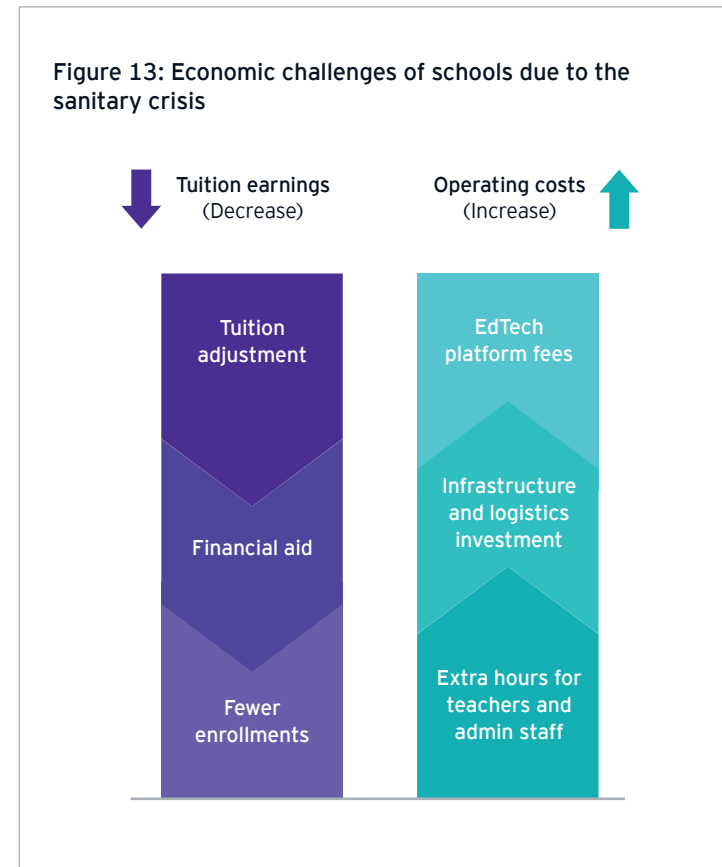
Next

Until schools reopen and go back to normal, the education system will continue to struggle to stay afloat. Understanding what happens next for K-12 education will be key as schools will likely need to make important adjustments in how they used to run operations.

Going forward we expect some of the following dynamics as schools adapt to the “new normal”:

- ▶ **Remediation classes and extended school calendar:** Schools will likely have to deliver remediation classes across levels to help keep students at the same learning level and will likely extend the academic year.
- ▶ **Temporary tuition adjustments while remote learning continues:** Parents will continue to ask for discounts and flexible payment terms for tuition fees, as their personal finances will continue to be affected by the economic downturn.
- ▶ **Education platforms as a strategic asset for schools:** Education institutions will need to improve their online platforms and offerings, especially private schools. Parents will consider the technology capabilities as part of their decision criteria when enrolling their children in school.
- ▶ **Local regulations play a key role going forward:** The schools’ reopening strategies going forward will highly depend on local health and safety regulations and how they recommend continuing with K-12 education.
- ▶ **Schools potentially in a crunch:** As more financially affected families ask for tuition adjustments or discounts, schools will continue to struggle with decreased earnings and higher costs. Virtual classes have increased operating costs from EdTech platform fees to extra hour payments for teachers and other IT/admin staff to deal with the new reality. Moreover, schools will need to invest in infrastructure and logistics, as well as meet potential requirements (extra hours, platform payments, etc.) to adjust to the “new normal.”

As education regulators dictate the way going forward, we will continue to understand how the health crisis is impacting the K-12 education sector of Latin-American countries. We will launch additional surveys, as required, to understand how parents and students are experiencing the impact of school closures in their academic preparation. Due to the uncertainty, we believe schools that are flexible and can quickly adapt will be able to capture opportunities for growth in the new world.



References

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