EDNEXT

Raising the Bar on EdTech Advertising

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"

The best brains of the
nation may be found on
the last benches of the
classroom

Dr. A. P. J. Abdul Kalam

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CONTENTS

Introduction

The Advertising Standards Council of India is pleased to present EdNext, a comprehensive report on EdTech sector advertising and the impact it has on students and parents. Globally, education and healthcare are two sectors considered paramount when it comes to impacting lives and society. It is no wonder that stakeholders are acutely tuned into the practices and narratives followed by companies to acquire and engage customers.

This report presents the views of different stakeholders such as consumers, government, domain experts as well as the industry. It highlights both positive aspects and concern areas, and puts forth new compelling opportunities for the sector, while balancing the industry's need for growth with the needs of its stakeholders.

EdTech is a golden opportunity for Indian students and society, and when brands communicate with their stakeholders, most significant of whom are young students and parents, it comes with the additional responsibility of ensuring that these messages are carefully constructed. The education ecosystem has many challenges that are expected to continue, such as hyper-competition, unfulfilled aspirations, limited pool of good teachers, thereby turning the years of learning and development into the provebial "pressure cooker" situations.

In this context, EdTech can potentially take the lead and fuel the learning space with futuristic and progressive narratives. The biggest opportunities for brands lie in creating genuine solutions to the existing bottlenecks and impact lives positively, rather than build a business by reinforcing or exploiting vulnerabilities that form the dark side of the Indian education system. The stories EdTech tells can have immense influence on the people it tries to reach due to the scale of its advertising and messaging programs.

Our collaborators, Sprint Studio.ai, spoke to a wide set of stakeholders including parents, students, policy makers, educationists, experts in marketing and creative areas, as well as human sciences, to lay out the challenges and opportunities for the sector today. UNICEF, our knowledge partners, helped us in providing technical expertise in the design of the study to understand the long-term impact of education communication, as well as in decoding advertising messages and their impact — both intended and unintended. Their vast experience enabled us to reflect on the big picture and the long-term impact of advertising on vulnerable minds.

Parul Ohri worked with us in the final mile to put together the study in a well-structured and comprehensive manner.

The EdNext study focuses on advertising narratives and provides new starting points for the industry. It makes for compelling brand stories without compromising consumer interest.

From an ASCI perspective, this report is an initiative as part of our larger goal to help industry get their advertising right. Efforts such as these seek to nudge, inspire, provoke and provide starting points for conversations and introspection. We believe this study provides the ignition for a positive spiral that increases trust between advertisers, consumers and other stakeholders.

We hope that you find the study useful, constructive and thought provoking. As always, we look forward to your feedback and views on the study, and on any other matters pertaining to responsible advertising.

N. S. Rajan
Chairman, ASCI &
Director, August One Partner LLP

Manisha Kapoor
CEO & Secretary General, ASCI

A Note from the India EdTech Consortium (IEC)

India has the potential of becoming the EdTech capital of the world. To make this vision a reality, we as responsible custodians, need to create an environment which fosters growth and opportunities for our students and key stakeholders, whose lives we impact every day. EdNext is one such report that highlights and showcases the scale of EdTech in India. It primarily highlights the need to raise the bar on advertising pertaining to the EdTech industry. The IEC has a single-point agenda of safeguarding the interest of every student who engages with EdTechs and their offerings for enhanced learning and career growth.

EdNext is a sincere effort to streamline the guidelines pertaining to advertisements and relevant communications, which are designed to influence society at large. The findings of the survey are drawn after in-depth research and consumer study, which ASCI and the IEC (as a supporting body) have jointly performed. It factors key challenges faced by various stakeholders such as parents, students, and industry experts, while spotlighting parameters which are crucial for laying down an effective structure. It also presents the opportunities that lie within advertising in the EdTech industry, and with a structured framework in place, how both brands and consumers can benefit proportionally. Transparent and accurate product advertisements can make India's EdTtech ecosystem a powerful engine, thereby not just accelerating the acceptance of online education, but make it a reality for every household. It is apt for brands to highlight real-life journeys of students to further motivate millions of others who may never know how impactful and cost-effective such EdTech-induced products could be. The need of the hour right now is to have ethical advertising in the industry, and we all are equally responsible to make it happen.

Mayank Kumar

Chair, IEC
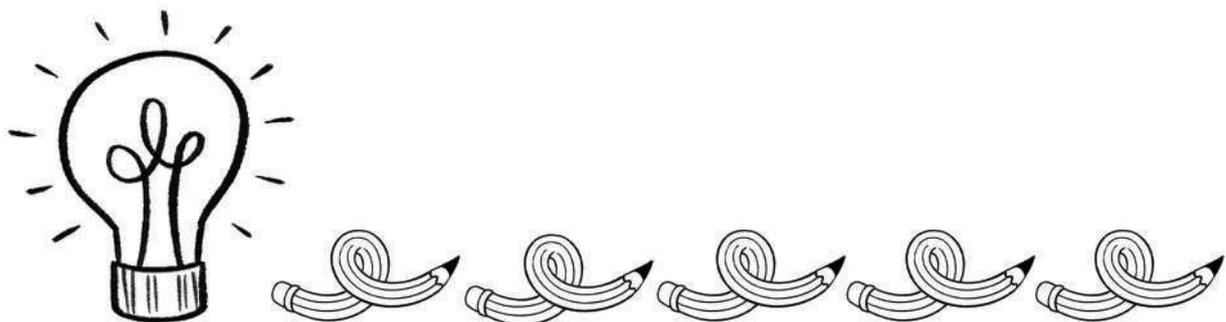
The Education Context in India

India is a country of the young. With 27 percent of the country's population aged under 15 years, and 52 percent of its people below 30 (source: National Family Health Survey-5, 2019-21), it is more an obvious fact than a cliché, that India's destiny lies in the hands of her youth. Education has already demonstrated its ability to be a game changer for the ordinary citizen of the country. Its future trajectory will be highly influenced by the availability of widely accessible and high-quality educational opportunities.

The traditional 'Chalk and Talk' methods of teaching have seen many generations through, paving the path to economic and social mobility. Government policies and programmes have brought about noticeable improvements in key markers such as increasing school enrolments and reducing drop-out numbers. According to the 2018 statistics of the Dept of School Education & Literacy, Ministry of HRD Government of India, the Indian education system is one of the largest in the world with more than 1.5 million schools, 8.5 million teachers and 250 million children from varied socio-economic backgrounds.

The staggering numbers however, cannot compensate for a system that may be falling short at many levels. The 'India Early Childhood Education Impact Study' by UNICEF indicates a learning crisis, where children are enrolled in school but fail to learn even the basics. The study documented children's institutional participation, assessed their school readiness levels and subsequent early grade learning outcomes, among other parameters. It was found that while problems of access are slowly being addressed, what the country needs urgently are drastic improvements in the quality of education. The Annual Status of Education Report (ASER), an annual, nationwide rural survey of children's ability to read simple text and do basic arithmetic reinforces this need, with data that shows the inability of nearly two-thirds of Grade 4 and one-third Grade 8 children to read a Grade 2 textbook.
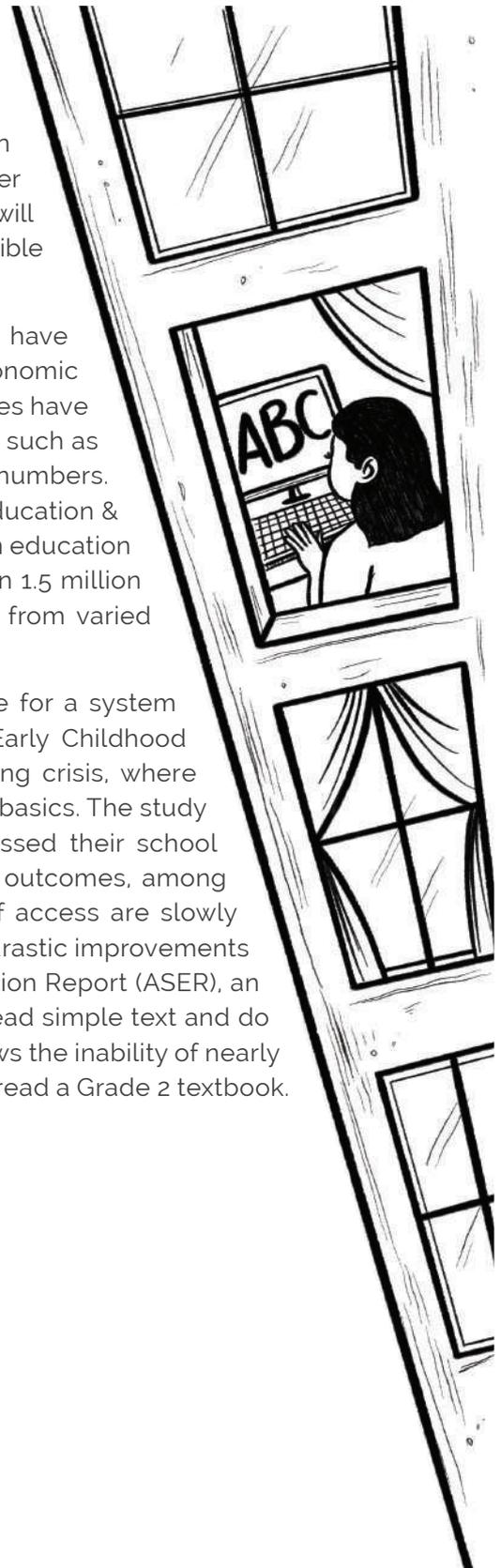
While private tutoring has come to the rescue of many students struggling with learning gaps, it remains fragmented and unorganized. EdTech or Education Technology is a promising trend in the area of education - one that has made successful inroads into both parameters of access and quality, and has the potential to redefine the education landscape. Simply put, EdTech is the application of rapid scientific and technological advances in the classroom to improve access, engagement and enriched learning experiences. The benefits of data science, machine learning and artificial intelligence has the ability to impact the distribution of enriched and focused content formats in a more equitable way.

The COVID-19 crisis changed the composition of the education landscape drastically.

Today, as more and more players from the EdTech sector join the coveted ranks of startup unicorns, the size of the industry is estimated to reach $30 billion in the next 10 years, according to a report by the transaction advisory firm, RBSA Advisors. Just over the last five years, the EdTech space has attracted private equity investments of over US$ 4 billion. Supportive policies and initiatives by the Government, including allowing 100 percent FDI (automatic route) in this sector, will further strengthen the growth prospects of the industry.

EdTech as the messiah for the Indian educational landscape?

A fast-growing industry with excellent growth prospects, an efficient solution for infrastructure issues plaguing the reach of education in India, a vast variety of products to suit the demands of parents and students — is EdTech the saviour we are looking for to revolutionise the education system in India?

As we dig deeper, we find as much concern as there is acceptance for the EdTech industry in India. To understand this, we need to think about how we view education collectively as a society. Till very recently, and it could be argued that this is true even today, education has been placed on a high moral pedestal, and at a safe and virtuous distance from money. Teachers have enjoyed a high social status and are greatly respected, even if they are not wealthy. Mythology is replete with examples of great kings bowing before their teachers, such was the reverence for knowledge. Knowledge was placed above money in social hierarchy. Teachers were entrusted with the noble task of imparting knowledge in the form of life skills, self-realisation and values. At some level, we still relate to the idea of education through these codes. EdTech has however embraced a somewhat different approach. From pure and virtuous to primarily transactional, the learning curve has been steep for students and parents alike, as they struggle to balance their desire for an extra edge and accept the motives of those offering it. The codes of EdTech - populist, shiny, transactional, money-focused — are at odds with our cultural instincts with respect to education.

According to the ASER 2021 report, there was a clear shift from enrolments in private to Government schools at an all-India level. Due to long school closures and uncertainty, the proportion of children engaging private tutors also increased significantly, even among the less advantaged. On the one hand, learning gaps, higher dropout rates and glaring disparities in access to education were on an alarming increase, while on the other, tech-enabled platforms commendably offset some of the inequities by offering on-demand education without the constraints of geographical limitations.

Today, when the end objective is about business gains and valuations, the student is no longer seen as a recipient of knowledge but as a target, impersonally categorised based on socio-economic status and geographical location. As new and exciting as the industry is, the challenges are many — poor accessibility, digital divide, high pressure and more recently, concerns around misleading advertisements and unfair trade practices, as highlighted by experts, the Government, consumers and the industry itself.

Why is the EdTech industry under scrutiny?

EdTech has the potential to accelerate India's dreams of becoming a knowledge hub. With the sector's ability to scale, it can transform the entire scope of education powerfully and reframe the narrative. Unlike most sectors, education touches every single consumer, irrespective of socio-economic class and geography. Education is also unique in its association with high hopes and aspirations for a better life, resulting in a massive emotionally vulnerable market, susceptible to alluring promises of higher marks in tests, guaranteed admission to premium institutions or jobs. Many of these promises are unverifiable, but eagerly lapped up as the miracle solutions desperately sought by anxious parents.

Far from old-world coaching classes that are restricted by physical limitations, the EdTech onboarding model is infinitely leverageable, creating the pressure to relentlessly enroll students. Achieving a large consumer base and high-ticket size is the name of the game in the valuation world, and EdTech businesses are leaving no stone unturned to bombard parents and students with advertising messages and calls. This hard selling of education seems to bother many stakeholders, as it treats parents as customers and creates the uncomfortable perception of commodification of education.

With access to large budgets and influential brand ambassadors, EdTech companies are able to reach out to newer local and regional audiences, creating a demand for their products like never before. Education has been one of the most misleading sectors when it comes to advertising, and in its quest to onboard students, the EdTech sector seems to be falling into this trap.

In the absence of complete or credible information, the decision-making ability of parents wanting to enroll in these programmes is compromised. Aggrieved parents have spoken out in large numbers on social media, trying to bring attention to their issues around infrastructure, quality of teachers and refund of fees, among many others.

As concerns around some practices of the EdTech industry came to light, the angst of aspiring parents feeling trapped by aggressive marketing practices of EdTech companies did not escape the attention of the Government of India. An advisory was issued in December 2021, asking people to exercise caution while engaging with EdTech companies and in availing their services, with a specific list of Dos and Don'ts clearly spelt out. **(Annexure 1).** The advisory stated that these areas to be considered by the e-commerce entities and would therefore come under the ambit of the laws and regulations governing an e-commerce company in relation to its consumer actions, advertising and marketing strategies. While ASCI had issued detailed guidelines on advertising for the larger education sector as early as 2013, it may be time to consider a review to address the new concerns.

The Study Methodology and Approach

EdNext is an initiative aimed at laying down a more progressive and responsible narrative of advertising for the EdTech industry. It addresses the concerns of stakeholders even as it engages deeply with its consumers.

To identify the nuances of EdTech advertising, we spoke to a wide set of stakeholders including parents, students, policy makers, educationists, and experts in marketing and creative areas and human sciences, to decode the challenges and opportunities before us today. Besides experts, our team spoke with **490 parents and students in eight cities**. This included both qualitative and quantitative immersions.

This study focuses on the K-12 segment of EdTech offerings.

Methodology details

A comprehensive list of 100 ads across TV, print, digital video and static ads was compiled. Stakeholders were shown combinations of these ads across a mix of depth interviews, roundtable discussions and structured surveys to gauge their feedback from a qualitative and quantitative lens, covering 490 parents and students from eight cities across India — Delhi, Bangalore, Indore, Kanpur, Patna, Kolhapur, Warangal and Bhardaman — and ~15 experts such as marketers, creators and experts from various life sciences like career counsellors, psychologists, education experts, etc. The list of 100 ads scrutinized mainly includes those aired in recent years. Besides being exposed to stakeholders in research interviews, these ads were codified and analysed to identify depictions of various aspects such as showing boys or girls as leads, persona of the children, kind of subjects covered, depiction of parents, depiction of teachers, key messages etc., to understand how they tie in with what stakeholders feel about EdTech ads.

Broad areas of enquiry

1. **An overview of the education system -** Stakeholders were asked their opinions on the current education system in terms of the positives, negatives and what they felt could be improved in this sector. This included understanding the experiences of parents and students, and observations made by experts on how the sector has moved.

2. **What do stakeholders feel about EdTech brands? -** Having understood perceptions of the education sector in general, discussions then moved to what stakeholders felt about EdTech brands with respect to (a) what differentiates them positively/negatively from conventional schooling, (b) the opportunities EdTech brings to the ecosystem at large, (c) what makes parents and students keen to explore EdTech, (d) the barriers for parents in enrolling their children, and (e) their experiences and what have they heard about the experiences of other parents and students. Experts also weighed in with their opinions of the change that the EdTech sector has brought in, the pitfalls they should watch out for, and anything else that they feel the EdTech sector could change to make a bigger difference in the lives of children.

3. **What do they feel about EdTech ads? -** Stakeholders were shown a combination of ads across TV, print, digital video and static ads across multiple brands to get a sense of (a) what they feel about EdTech ads, (b) what they liked or did not like about these ads and why, and (c) what would they change about the ads. Parents were shown ads relevant to their child's age —for instance, parents of 3-7 year olds were shown ads that are meant for kids of that age bracket, to ensure meaningful responses on the ads shown.

4. **What next for EdTech? -** Finally, we asked stakeholders what they would want EdTech brands to start, stop and continue showing in their advertising to help the industry understand what they were doing right and what could they do better.

PART A

Summary of Findings and Way Forward

Reshaping the Narrative on Learning

Keeping messaging and its impact as the key focus, this report aims to decode the challenges and opportunities that lie in advertising in the EdTech industry, and highlight the pertinent aspects that the industry may explore while building communication. Following immersive interactions with a wide set of stakeholders in the education landscape, including marketers, creative teams, experts, parents and students, their feedback was analysed at a qualitative and quantitative levels to understand the concerns and opportunities vis a vis communication from the EdTech industry.

An interesting and key facet of the findings of the study indicates that for parents in the throes of their child's education challenges, EdTech advertising seems to be by and large fine. For them, EdTech offers the solutions they are looking for. Concept-based learning and attention to students find huge favour with parents. Given this, it was important to examine the reasons for the angst and scrutiny that the EdTech industry faces today.

The specific context around EdTech advertising and industry must be understood to examine the current challenges it faces. This goes into the heart of the debates and criticisms faced by the sector.

Pattern Identification

An in-depth analysis of 100 ads from the EdTech industry across TV, digital and print reveals some dominant patterns, based on coding of creative elements such as context, characters, messages, product benefits, and visuals.

1.   **Toppers, all**

Nearly half of the ads analysed talked about better results or high scores in exams, and highlighted past toppers who enrolled with them. About one-third of EdTech ads use some sort of superlative claims of being the 'best' or 'largest' or 'top' in some parameter. 26 percent of ads make promises guaranteeing success in the form of improving marks, helping students become a topper, etc. Besides the fact that many of these claims are misleading, they also feed into a deeper issue. These narratives underscore and reinforce the narrow view of education. While the marks-linked narrative is not unique to EdTech, spending crores of rupees in perpetuating this narrative can be considered undesirable for society at large. This pattern is seen as problematic by several experts and parent groups that are able to look beyond the immediate impact of advertising promises.

2.   **War and warriors**

In some ads, exam times are shown as a war-like situation and students as warriors fighting a battle. The music and the dramatisation create an atmosphere of a do-or-die battle. The stress is shown affecting both students and their families. A very clear underlying message is that failure is not an option, and that the entire future of children rests on scoring well in exams. Sacrifices to sleep and relaxation are normalised even for middle school students.

3.   **The tyranny of maths and science**

The analysis also revealed a distinct bias in favour of showing either maths or science as prime subjects, while the focus on other subjects is insignificant. Again, one might argue that these typically happen to be the subjects that parents and students themselves are concerned about, and therefore advertising would naturally highlight or address those. But when we see this through repeated portrayals and reinforcement, it normalises the disproportionate importance of these subjects, rather than stay true to the taglines of almost all EdTech brands that promise more holistic and well-balanced education support.

Out of 100 ads, 50 showed maths and 48 showed science. English was shown in only nine ads, while other subjects such as history and geography showed up in eight ads. Five ads showed coding.

4.   **The missing teachers**

Though important to parents, teachers seem to be kept in the background in most EdTech advertising, or were used as props. Out of the 100 ads analysed, 55 ads depicted a teacher, but only 14 ads had an active role for the teacher, or showed an active teacher-student interaction. Out of those, teachers were shown as compassionate or encouraging only in nine ads.

In some ads, they are seen as uniformed representatives of the EdTech platforms. This is a departure from the cultural lens through which our society sees teachers and their contribution, and such representations can make parents and other stakeholders uneasy.

5.   **Stereotypes creep in**

One of the patterns observed is a gender imbalance in representation of children that interact with EdTech, with representation skewed towards boys. In ads showing maths as a subject, boys were chosen as the protagonists about 2.5x more than girls. Even mothers were depicted in

stereotypical roles – around the kitchen or watching TV/serials. The gender bias in favour of men also extends to teachers featured in the ads and celebrities endorsing the brand. This is alarming as a new industry might be expected to be more progressive in this regard, and not reinforce harmful stereotyping. More conscious efforts need to be undertaken to correct this bias that has crept into EdTech advertising.

The study showed that boys were chosen as protagonists 1.8 times more often than girls in ads showing a single protagonist.

Stereotypes in physical attributes also showed up, with kids with dark/dusky complexions being severely under-represented.

Unidimensional portrayals of studious kids rather than showing a diverse set of kids further perpetuate stereotypes.

6.   **Parents as partners**

It was encouraging to see that across almost all ads, the child and the parent are shown to share a warm and mutually respectful relationship. Only a few ads indicated passive pressure from parents, and in most cases parents are shown to be supportive.

7.   **Celebrities**

Thirty three percent of EdTech ads examined in the study used celebrities to endorse their products. In some cases, attributes of celebrities, such as perseverance, were used as inspiration, though none of the ads featured known personalities from an academic field. In fact, celebrities who featured dominantly were popular film superstars who are, ironically, considered academically poor or average.

Expert Speak

The undisputed EdTech potential is clouded by some red flags.

The positive impact of EdTech companies to strengthen concept-based learning with interactive teaching methods remains undisputed, as acknowledged by the expert panel from the field of education and child health.

All experts agreed that EdTech is a long-needed solution to the problem of unavailability of high-quality education in many small towns, with its ability to breach geographical barriers and limitations of physical infrastructure.

While the panel of educationists hailed EdTech's ability to tackle the problem of accessibility, they also called attention to the interpretation of such accessibility, as the spectrum of socio-economic inequalities between no access at all to full access is considerably vast. Gender disparity in the digital learning space is still a challenge, as many parents may not give a device to girls for fear of online predators or 'wrong' exposure. For educationists, a key issue is the lack of any benchmarks to evaluate the content and methodology of any EdTech product. Parents tend to make a choice based on what is popular, but that may not necessarily be high quality or may not be appropriate or productive for a particular child.

The panel of government officials and policy makers were particularly emphatic about technology remaining an aid to school and teachers, and not a replacement. When discussing about programmes available digitally, they also called for a balance of work and play, especially for middle school and younger children, who may get overburdened by a full school day, and then more studies on a digital platform. Child psychologists pointed out that the existing education system is not effectively linked to human development, and that is why ads that pushed fast track learning, success and competitiveness seemed particularly out of place. They would have liked to see ads that went beyond the stereotypes of success (marks or admission or a job), and actually showed a process of intellectual and personality development.

Other advertising patterns concerning experts included the use of unsubstantiated ranking claims and superlatives, inadequate representation of gender, stereotyped visual representation of a specific socio-economic class and physical appearance, outcome-led promises, overt focus on exams and using marks as key markers of learning.

Educationists were appreciative of ads that celebrated the uniqueness of children and wanted EdTech to take the lead in continuing such portrayals.

One of the most alarming concerns highlighted by experts was that the insecurities and vulnerabilities of parents were aggravated by creating a false sense of urgency and a fear of missing out.

Experts were of the view that EdTech communication was significantly skewed towards traditional and popularly acceptable domains, rather than encouraging curious self-learners inclined towards unconventional career choices.

The Industry Perspective

Acknowledging and recognizing errors, a desire to focus on the undisputed benefits for students

EdTech marketers were aligned to the vision and the reality of the industry being a major disruptor in the education sector. They firmly believe that EdTech has an altruistic purpose of improving lives and in that respect, marketers across the sector are conscious of their roles as not only a support structure to the educational ecosystem, but also an important value-add. Industry representatives highlighted how EdTech brings added value in two forms — encouraging children to be active learners by bringing in personalisation, concept based learning and one-to-one attention by teachers, and by stimulating interest and curiosity through the introduction of many new subjects and use of interactive technology and innovations, such as gamification.

The industry also believes that EdTech can address many infrastructure challenges, including training teachers for the digital ecosystem, creating enabling teaching platforms and digitisation at the school level.

Marketers agreed with other experts about the undue pressure on children created by the Indian education system, but were clear that it cannot be attributed to EdTech, which is, in fact, playing a constructive role in mitigating stress by offering new opportunities for enriched learning, through capsules customised to a student's needs and learning styles. This potentially enables unique learning journeys for children, especially with the use of gamification, 3D and many other tech-based teaching aids. However, there was some acknowledgement that the increased academic pressure on children, especially the younger age groups, is an area of concern. They introspected on the harmful physical effects of increased screen time and its impact on childhood, especially with respect to curiosity, creativity, play, etc. They believe EdTech to be a good support system for children going into senior classes, but acknowledged that some of the representations of education and aspirations in EdTech may build undue pressure on young kids.
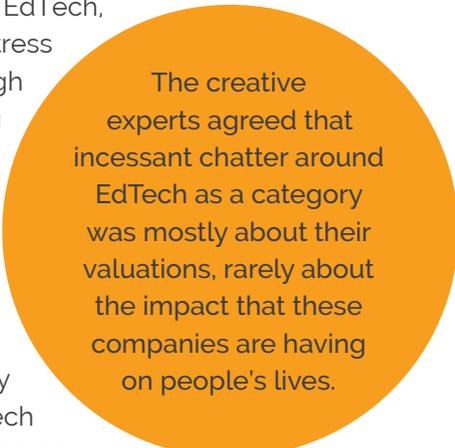
> The creative experts agreed that incessant chatter around EdTech as a category was mostly about their valuations, rarely about the impact that these companies are having on people's lives.

Creative experts expressed concerns over ads that projected children as young as seven years building apps, solving global problems or becoming millionaires. They also called out ads that pressurise the already guilt-ridden parents with misplaced feelings of inadequacy or urgency.

EdTech — a feeling of being unacknowledged for the value they bring in

The marketers candidly accepted the errors made in the past. But while accepting the injudicious positioning in some advertisements, the industry also felt that the objective to benefit every student, gradually moving them all to the front row, had been misconstrued to be an overemphasis on 'toppers' due to insensitively framed communication. Many leading EdTech companies have made significant contributions to teacher training and upgrading of infrastructure to make local schools more tech-oriented in the weaker sections of society, but unfortunately, that work largely goes unnoticed. As one EdTech marketer said- *"I think we have done a bad job in talking about the good things which all of us are doing."*

The industry representatives reiterated that just like any other business, they cannot be expected to move away from being focused on outcomes and responding to market demands, albeit recognising the need for sensitivity and prudence.

The industry acknowledges that parents entrust them with the future of their children and they in turn, need to present the most genuine, inclusive and prudent communication that maintains the best interest of the child as the key objective.

Looking through the Lens of Parents

Conversations with parents revealed that they are very open to new concepts and support the visual, immersive and personalised learning approach that EdTech offers. Being time-deficient, they heavily depend on information shared through advertisements while making choices on the need for these classes and subsequently, also enrolment. This was especially true for parents of younger children.

Nine in 10 parents feel ads are important factors that aid choice of class/course to enrol their child in, and hence also trust these ads.

Almost all parents appreciated the ads which showcased children studying without being asked and enjoying the process of learning. Much like their children, parents also appreciated the depiction of a stress-free environment and connected strongly with the joy of learning. Ads that were received well had a common narrative focused on conceptual learning to build a strong foundation and personalised attention, especially with respect to clearing doubts. The prospect of studying anytime, anywhere, and at one's own pace was equally appealing. While marks emerged as a tricky issue, those ads that attributed better results to conceptual learning were well received.

Not everything in the ads met with their approval though, with false promises emerging as the top grievance. Seven in 10 parents felt that EdTech ads make promises which are difficult to achieve by students. Parents clearly see through the tall claims of very high marks or top ranks, and highlighted how such outcome-led promises put pressure on parents and students alike.

Cheap pricing/discounts and refund-related information have poor credibility with parents, who are aware that such claims are usually entwined in a web of terms and conditions. Instead, parents seek clear information about the outcomes/improvements from using the brand. Teaching style, teacher qualifications, personal attention, learning something new and price have emerged as the top information sought out by parents. The more informative the ad, the more it was found to be convincing for parents. In fact, for some it held more value than a celebrity endorsement.
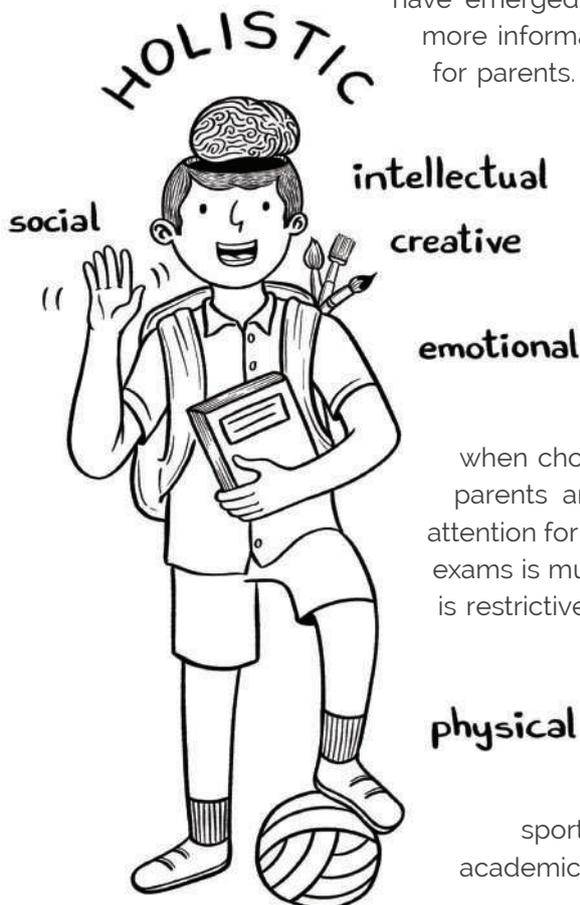
Many questioned the relevance of film stars, and instead sought role models, whose successes were backed by solid academic credentials. While the presence of a celebrity is considered a sign of popularity and may drive initial interest, parents claim that their purchase decision is based on many other considerations and thorough research at their end. Survey results showed that when choosing online classes for their kids, the top drivers for parents are teaching style, quality of teachers and personal attention for their child. Interestingly, the promise of scoring well in exams is much lower in hierarchy. Parents feel focusing on marks is restrictive and were not happy with ads that had the narrative around 'winners' or 'toppers',' which they felt alienated many deserving students. They were instead in favour of representations showcasing conceptual clarity and improvement or progress. In terms of content, they would like to see achievements in sports and other activities to get as much of the spotlight as academic excellence.

Students' Perspectives

Out of all the stakeholders in the education landscape, the ones that hold the maximum stake are the students. Our immersive interactions with students revealed that many of them make for highly conscious consumers, aware of the competitive arena and what it takes to stand out. Students, particularly those from the small metros, recognise the value of the EdTech opportunity, primarily, the access to the best teachers from across the country, and innovative teaching techniques. While for regular schooling, students prefer the offline environment, they have found online coaching classes to be the solution to the typical problems of an ineffective teacher-student ratio and lack of individual attention.

Cultural connotations and idealism may have put education on a high pedestal, but the student of today has a much more practical association with the structured process of learning. For them, education is complex and pressurizing, as well as interesting and fun, depending on their inclination to what is being taught. The pressure amidst the fun in academics seems to come predominantly from one direction – their parents! The ultimate target of 'good marks' is the unsaid seal of approval from parents and teachers on the child's efforts towards a bright future. This is interesting in the light of parents stating that they would like advertising to not focus so much on marks, but that seems to be the very expectation they have from their own wards. Students may be exploring several interests on an extracurricular level, they return to the safe, well-trodden path when it comes to higher education.

When shown the ads from the EdTech industry, the astute and savvy students questioned the claims that deviated from their experience or knowledge of the brand. They were quick to catch dissonance from reality and were clear on what they expected from the ads. The promise of a compassionate teacher, who engages with and motivates the student beyond academic boundaries, was appealing to students across cities.

Students were not easily swayed by an emotional storyline and wanted the ads to focus more on the tangible benefits of the app. They also would like to ascertain affordability, because they understand it would be a deciding factor for their parents. The ads leave most of them with unresolved questions — for example, subjects/exams, teaching techniques, whether they are live classes or recordings, etc. — answers to which they need to find online later.

The over-emphasis on increasing marks or making toppers did not convince students, who would instead have preferred an insight into the pedagogy, content, strategies and other offerings which contribute to a student's growth. Showcasing high-ranking students evoked mixed reactions — considered motivating by some as a proof of EdTech's success, while seen as pressuring by others.

Students also seek role models and would rather see prominent personalities who have achieved something with a sound educational base.

"Sometimes we require motivation when we are at our lowest, rather than scolding us, parents should motivate us"

Student, Metro

"I don't think celebrities are important. But if someone popular like Sundar Pichai or certain popular startup owners, If they would promote it, would have an impact. Because we have seen that they achieved great success coming from humble backgrounds."

Student, Tier 1

Opportunities and New Spaces

The EdTech industry does appear to have the intent of attracting consumers based on holistic promises of learning, as is evidenced in their taglines. Many of them refer to concept learning, thinking and understanding, and personalised learning. However, in many cases, these messages are reserved for thematic campaigns or special occasion films. The mainstream category advertising, particularly in print and digital media, tends to be more transactional and deploys the very tropes it seeks to differentiate itself from traditional education.

The opportunity to tap into the progressive notions of education and learning is real. The ideas of changing mindsets, broader notions of success and careers, inclusive learning, though still at a niche periphery, are aspirational for today's consumers and their quest for better parenting.

While these tropes of exam orientation, toppers showcasing, over-emphasis on maths and science are not exclusive to EdTech, it must be reiterated that these perpetuate some undesirable aspects of traditional education. The EdTech companies, and notably,w the visible nature of EdTech communication, solidifies the traditional and somewhat regressive narrative of stressful education, instead of opening it up to a future-facing and progressive one of meaningful learning.

Mindful approach to the opportunity

The opportunity for the EdTech industry is immense - not only in terms of individual brand gains but also the potential to be changemakers in the field of education in India, and leading to a truly meaningful transformation in society. The Indian EdTech Consortium (IEC) and leaders in the industry need to take a conscious stance to maintain and mainstream progressive depictions that create aspirations for a new way of learning, which will further continue to foster growth and inclusivity for its stakeholders.

Opportunities for progressive messaging in EdTech advertising

1. Highlight the **joy and curiosity** associated with learning, over performance pressure created by the importance typically given to marks.

2. Represent **diversity of student** needs and student types, and the ability of EdTech to respond in an inclusive way to all.

3. Create and show **new markers of progress** and success other than marks and ranks to reduce the performance pressure on every child to be a topper.

4. Open up the conversation on **other subjects** beyond the safe and popular maths and science. Give parents and students more confidence in the viability of a diverse set of choices.

5. Showcase **role models** from various fields, who inspire students and parents because of their academic achievements, rather than using celebrities with no correlation to the course or learning philosophy that they endorse. While popular celebrities may attract attention, they appear to lower credibility with consumers and other stakeholders.

6. Showcase the role played by **teachers and educators** in developing content, as well as empathetically partnering with students to help them learn better.

7. Provide greater **upfront information** about the courses, such as syllabus, methodology, learning outcomes or costs of the programmes, to enable easy and informed decision-making for parents and students.

8. Share **real life stories** of positive impact by the brand to motivate students struggling with lack of confidence and hope, and also to help the industry to secure credibility and trust.

9. Continue to depict **positive role models** for parents and other caregivers that can support the child in their learning journey.

10. A **shared agenda** coordinated by the IEC to collectively **drive responsible messaging** across all campaigns by its members will help address the concerns of key stakeholders.

Framework for Progressive and Responsible Depictions

Introducing a framework to facilitate a mindful creative development process for EdTech brands is important.

The right messaging can support EdTech to be a transformational engine that completely revolutionises the education landscape in India. Bearing in mind that it will impact the desires and beliefs of vulnerable and anxious students and parents, advertisements must be prudent and consciously created.

This framework is a set of recommendations, to which marketers and creative teams can refer while in the process of creating a new genre of evolved and progressive EdTech ads. **These are not rules of any kind, but rather a checklist to steer creators away from problematic zones, and towards a forward-looking course that restores faith and excitement in the process of learning.** The framework reflects the desires of students and parents as the discerning target audience, as much as it presents analytical inferences and observations of panels of experts, marketers and creative teams.
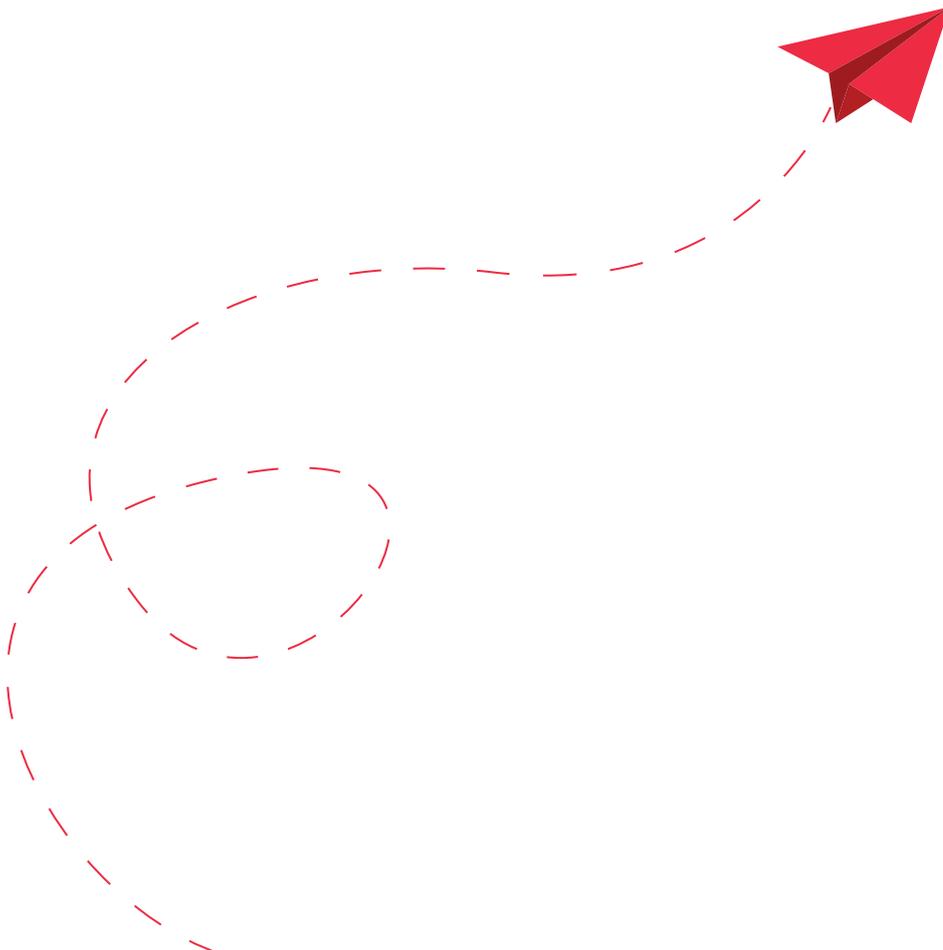
RAISE: A framework to elevate EdTech communication mindfully

The RAISE framework provides stakeholders a set of lenses to evaluate creative briefs and develop outcomes on depictions of students and the process of learning that is aligned with the desires and expectations of stakeholders.

RAISE

Relationship of the student with learning (does learning come across as joyful, holistic, wholesome rather than exam oriented and stressful?)

Authenticity of situations, promises and claims (is the information complete, clear, genuine and verifiable by authentic sources?)

Inclusive representation of characters (is diversity of gender, age, physical attributes, personality types, learning styles and pace, and region represented across the characters depicted?)

Spectrum of pedagogy (is there enough information on methods, and do they contribute to better and holistic learning outcomes?)

Excellence markers (is there a focus on overall development and multi-faceted learning over ranks and marks as measures of success?)

The framework moves cohesively along key checkpoints for ad creators to consider. The detailed checklist is provided in **ANNEXURE 2**

PART B

Research Findings

This part details some of the findings from our immersions with different stakeholders, as well as the decoding exercise

Findings from the Codification of 100 Ads across TV, Digital and Print Media

There are several patterns that emerged from an in-depth coding exercise of these 100 ads, when studied across parameters including context, characters, messages, product benefits and visuals. The decoding was done by the ASCI and Sprint team, in conjunction with experts from UNICEF and knowledge partners on the project.

Gender imbalance Is evident, boys get the spotlight

Four in five ads show kids, however, representation is skewed towards boys. Only one in every four ads depicted both boys and girls as the protagonists. For the role of the single protagonist, boys were chosen 1.8x times over girls.

Ads that showed any child	Boys as the protagonist	Girls as the protagonist	Both boys and girls as the protagonists
	37%	20%	26%

No. of ads analysed: 100
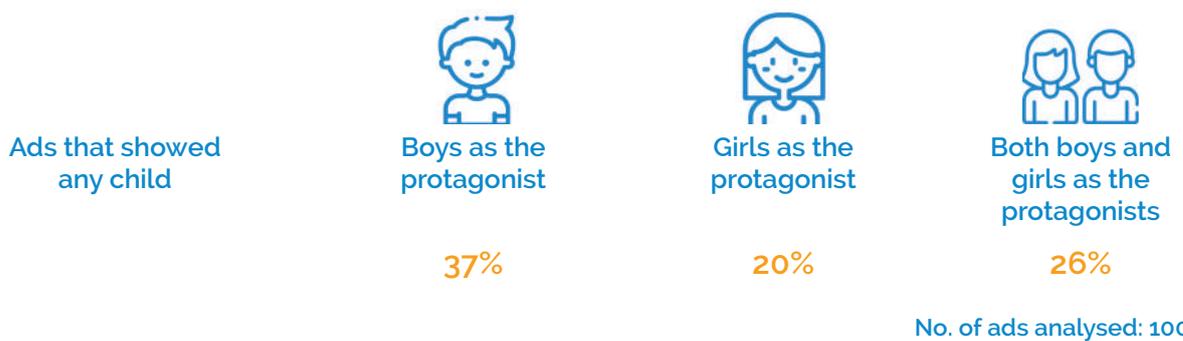
While science saw balance across both genders, maths overtly saw boys being portrayed as the lead protagonist

In ads showing maths as a subject, boys were chosen as the protagonists in almost four of 10 ads — which is about 2.5x more than girls being shown as the protagonist. Ads showcasing science as a subject fared better, showing boys, girls, or both, as the main character almost equally.

- Girls in lead
- Boys in lead
- Equal role of both
- No child shown

Ads with Maths as a subject = 50: 16%, 38%, 28%, 18%
Ads with Science as a subject = 48: 27%, 31%, 29%, 13%
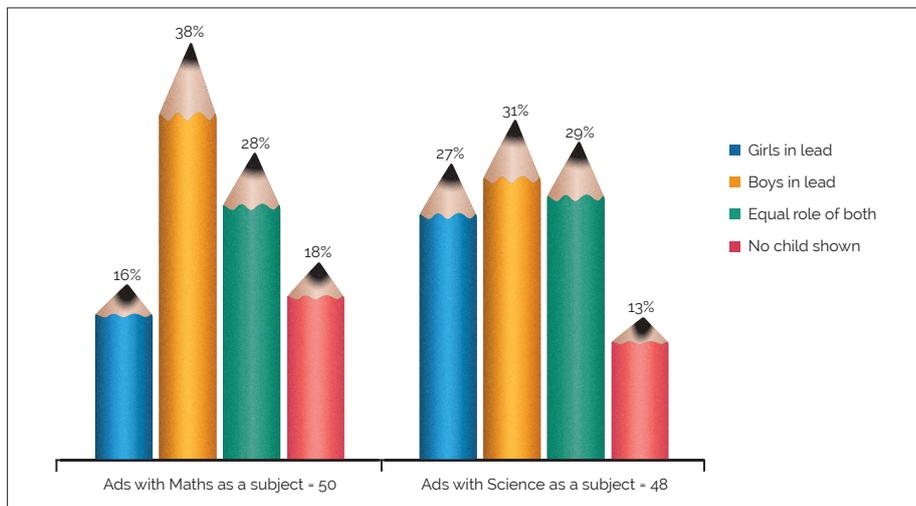
No. of ads analysed: 100

Focus stays on maths and science, insignificant presence of other subjects

Even as a vast majority of the ads focus on maths and science, only about a fifth of the ads depict other subjects. Interactions with parents revealed that those belonging to metro cities were more concerned about the fact that ads feature mainly maths and science as subjects. They also found extra-curricular activities missing from the ads.

No subjects shown	Maths	Science	Maths and Science	English	Coding	Other subjects
23%	50%	48%	31%	9%	5%	8%
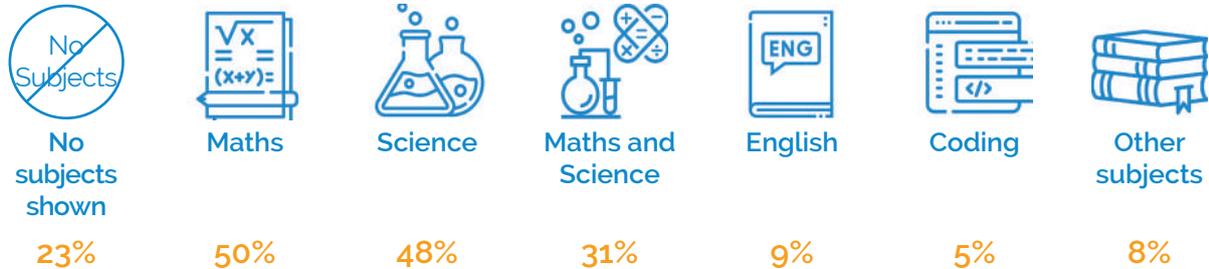
No. of ads analysed: 100

* Ads may show multiple subjects

Physical appearance depicted is not inclusive

Nearly three-fourths of ads depicted children with what is generally accepted as standard weight, while just six ads had other body types. Almost all the ads showed children with fair or wheatish complexion, while those with dusky/dark complexion were severely under-represented.

Advertisements liberally use superlatives, unsupported claims, or make tall promises

31 of 100 ads analysed made superlative claims of having the best, largest or most resources, such as, best teachers, largest faculty, top educators, best study material, best tuitions, X million students, etc.

More than 25 percent of ads make promises in the form of improving marks, helping students become a topper, or guarantee success.

31% — Ads with superlatives

26% — Ads potentially overpromising
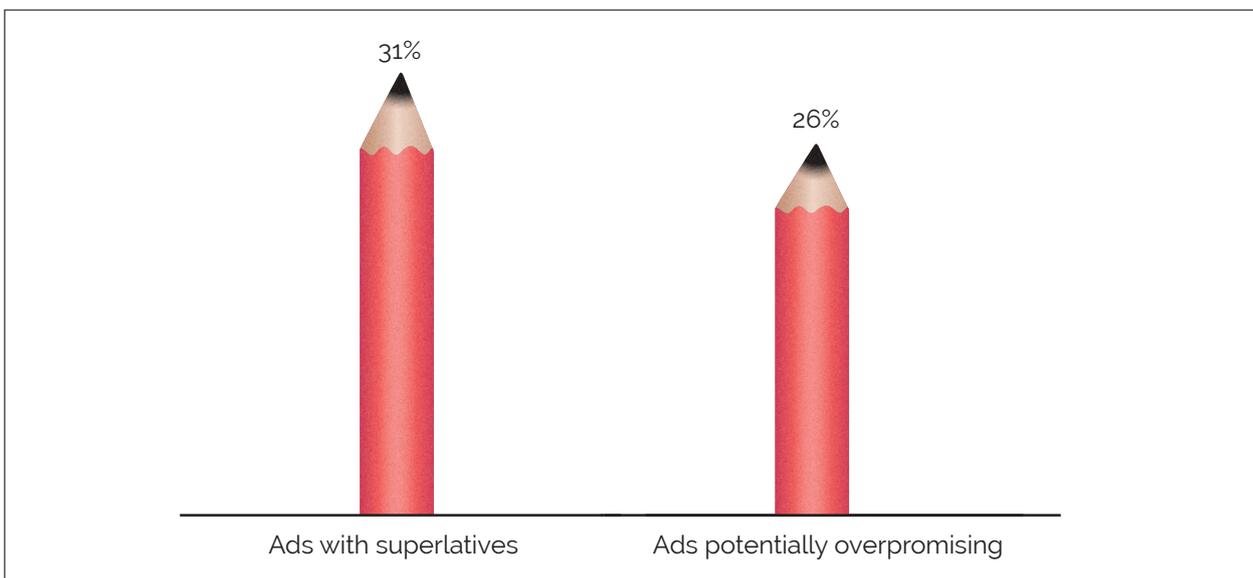
No. of ads analysed: 100

High scores in exams remains the primary benchmark of success	47 percent of ads analysed talked about better results/high scores in exams, exam preparation, or cracking the exams.
Parents when shown, are depicted as supportive; mothers relegated to stereotypical roles	Only one in four ads show parents — but when shown, the child and the parent share a warm and mutually respectful relationship across almost all ads (21 out of 23 ads).
	Of the 17 ads that had a role for mothers in the narrative, 11 depicted mothers in stereotypical roles that revolved around their being in the kitchen, or at the dining table, or watching TV/serials.
	While 10 ads show some form of passive pressure from parents, on the whole they are shown to be supportive of their child's effort to do well and share a warm relationship with their children in these ads. This aspect is to be appreciated as it provides an aspiration for progressive parenting.
Though important to parents, teachers have a limited role to play in EdTech ads	Out of the 100 ads analysed, while 55 depicted a teacher, only 14 had an active role for the teacher, or showed an active teacher-student interaction. Out of those,
	• Teachers were shown being compassionate or encouraging only in nine ads.
	• Of the 55 ads that featured teachers, 39 showed men as teachers, while 29 showed women teachers.
Choice of celebrities in EdTech ads leans very heavily towards male film actors	32 of the 33 ads with celebrities had male celebrities as the lead. Furthermore, of these 33 ads, film actors were present in 28 ads, with sports stars as the celebrities in five.

Quantitative and Qualitative Study with Parents

The deep dive among parents revealed interesting insights about the influence of EdTech advertising on their perceptions of the industry, and also how it impacts their decision-making.

Advertisements are a key trigger to get parents started on the EdTech journey.

Advertising emerged as the single largest factor that led parents to recognise the need to enrol their child on an EdTech platform. The second top trigger was recommendations by fellow parents, followed by influence from their own child. There were some interesting differences that emerged when we studied the influences by segments.

Advertisements seem to be a stronger trigger amongst parents of younger children — 53 percent of parents of the 3-14 year age group were influenced by advertising vs 41 percent of parents of older teens (15-18 years)

What helped them identify the need for EdTech Base: Users	Total 305	3-7 yrs 75 e	8-14 yrs 137 f	15-18 yrs 93 g
Advertisements	49	53[g]	53[g]	41
Other parents	34	40	33	32
Your child	32	27	32	37
Your spouse	30	36	30	27
Other family members	28	29	29	26
Other children who use such apps	27	23	27	29
School teachers	25	22	29	23
Coaching tuition teachers	24	31[f]	16	31[f]

Scores are expressed in percentages. | Comparison: 3-7 yrs vs. 8-14 yrs vs. 15-18 yrs

Significantly higher at 95% confidence

"I saw TV ad and newspaper ads. I came to know through this medium."

—Parents of 15-18 yo, Tier 1

"I got to know about it from my friends. But the majority of it was from TV ads. There are a lot of advertisements on TV. Yes. They advertise a lot on tv. You also get their ads on mobile and YouTube. So my husband and I thought of trying it one time."

—Parents of 3-7 yo, Tier 2

"See we of course came to know about it through social media and advertisements"

—Parents of 8-14 yo, Metro

EdTech ads are important in deciding the choice of class/course.

Nine in 10 parents feel ads are important factors that aid the choice of class/course in which to enrol their child, and hence also trust these ads.

Multitasking parents heavily depend on information shared through advertisements while making choices about classes/ courses in which to enrol their child. EdTech users attach significantly higher importance and trust in advertisements. Parents from non-metros are also seen to trust these ads more than parents from metros.

Importance of ads for parents to choose which classes/courses to enroll in

	Total (443)	User (305)	Non User (138)
	86	89	78
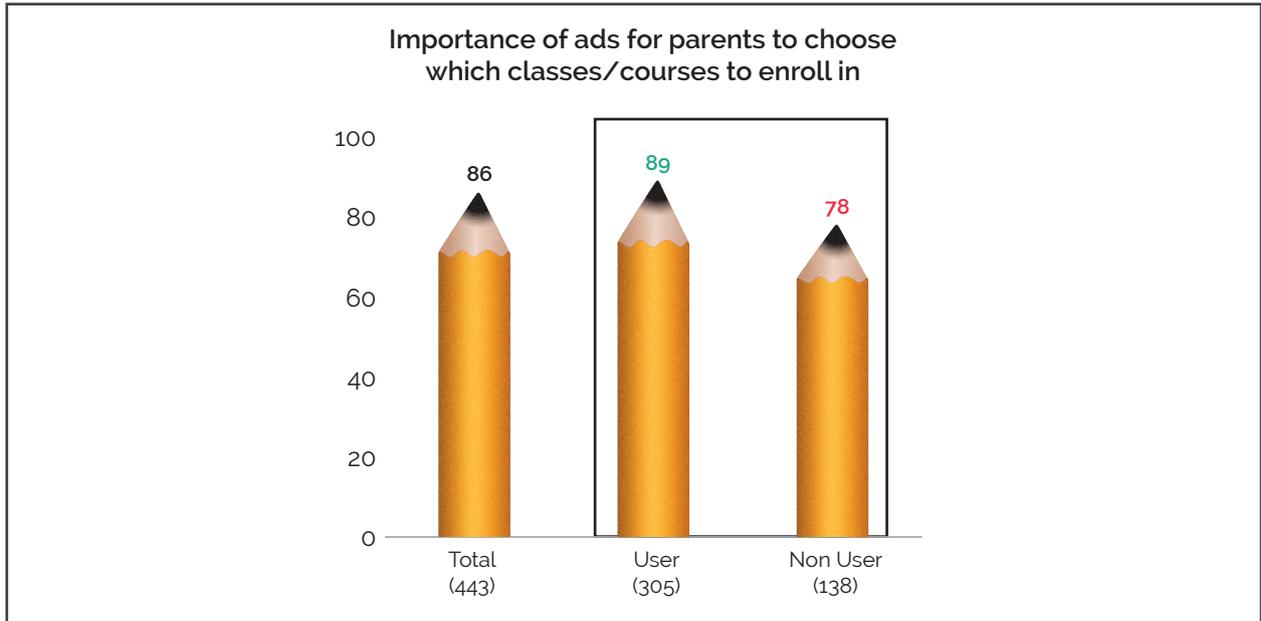
Scores are expressed in percentages. | Comparison: Users vs. Non Users | Green font indicates significantly higher scores and red font indicates significantly lower scores at 95% confidence

How much do you trust these ads

	Total (443)	Metro (191)	Non metro (252)	User (305)	Non user (138)
	81	76	85	83	75
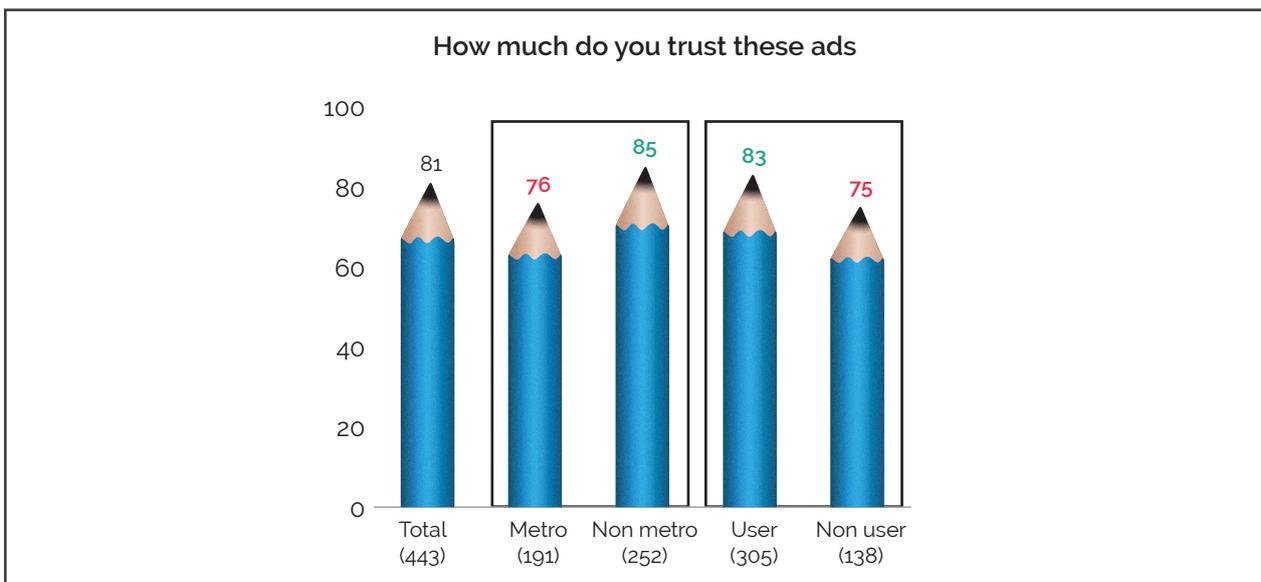
Scores are expressed in percentages.| Comparison: Users vs. Non Users & Metro vs. Non-metro | Green font indicates significantly higher scores and red font indicates significantly lower scores at 95% confidence

*"So I feel this
online thing is very good and best for us.
At least, we don't have to worry about whose house they are
going to study or even for the coaching classes we cannot
trust anyone so easily now. So that is why these
online classes have given us a lot of relief."*

—Parents of 15-18 yo, Tier 2
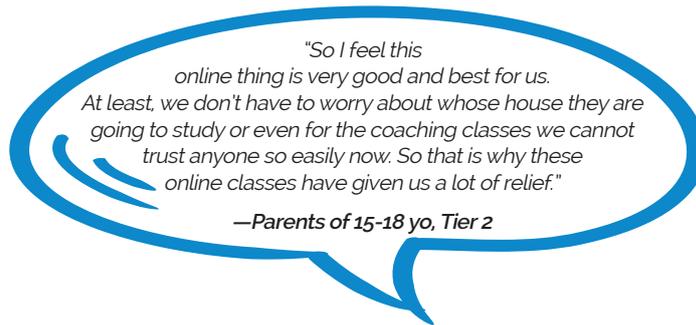
Parents have clear criteria for choosing an online class or course

Teaching methodology is the topmost criteria for parents selecting online courses.

EdTech courses involve significant investments of money and time, and parents are looking carefully at all aspects of the course to ensure it is worthwhile in every way. At an overall level and also true for non-metro parents, teacher's qualifications, personal attention to students are next in priority, followed by the opportunity to learn something new, and the price of the course.
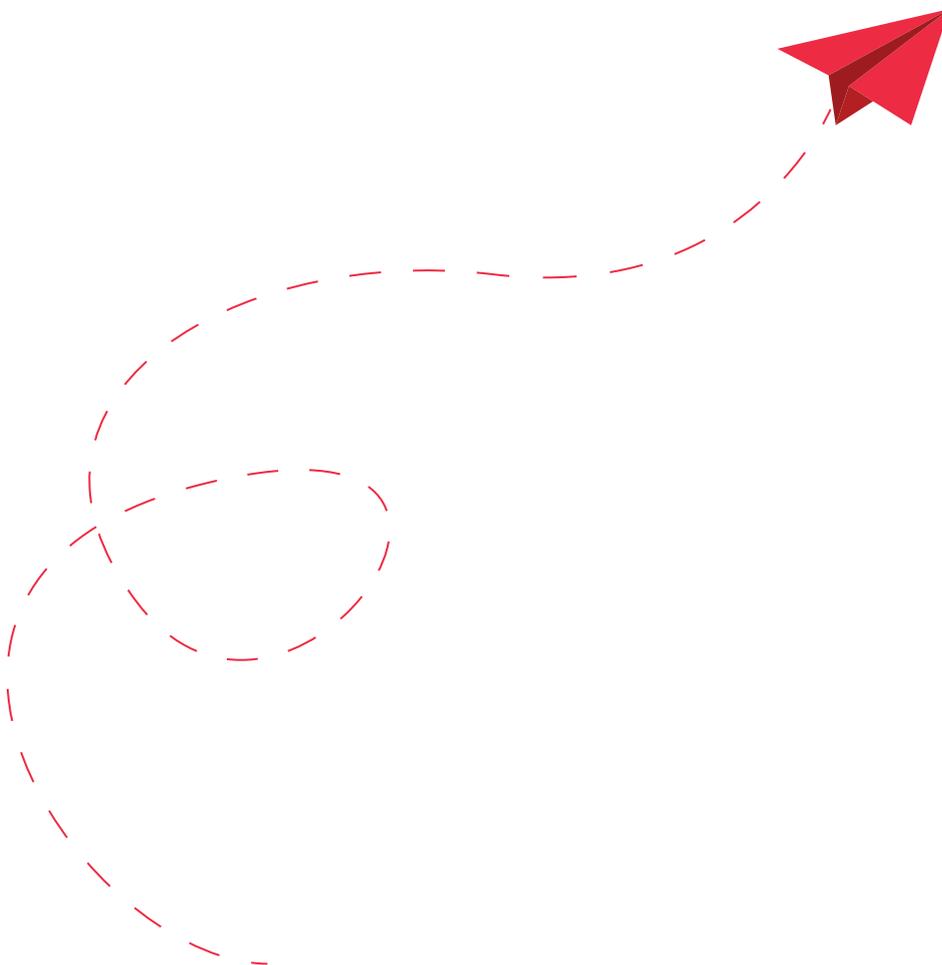
Giving them more confidence in investing money and child's time in right hands.

Interestingly, for metro parents, the price of the course was as important as the teaching methods, followed by the opportunity to learn something new.

There is also a significant difference in the drivers for experienced EdTech users and non-users. Parents of users seek the promise of better marks when considering an online class significantly higher than non-users.

Parents of non-users look at reputation, teaching style and price of the course as their top three drivers. Across the board, teachers' qualifications gain more importance in the order of influencing factors as the child gets older.

Top 3 factors for choosing an online class/coaching	Total	Metro	Non metro	3-7 yrs	8-14 yrs	15-18 yrs	User	Non user
Base: All Respondents	443	191	252	122	179	142	305	138
		a	b	e	f	g	j	k
Teaching style/Method of Teachers'	38	36	40	43	34	39	39	38
Teachers' qualifications	35	30	38	26	36	39^e	36	32
Personal attention for the child	34	31	36	33	35	33	35	30
My child enjoys learning something new	31	33	30	32	31	31	32	30
Price of the course	30	36^b	25	28	31	30	28	33
Promise my child will score well in exams	29	31	27	27	30	30	33^k	20
Reputation of the brand	29	28	29	30	28	29	24	40^j
My child gains confidence and becomes better	27	24	29	28	29	23	27	26
Curriculum/content offered	21	23	20	22	22	19	21	22
My child doesn't miss out and lag behind other kids	16	17	15	16	16	15	16	15
Whether any other bright student/topper uses it	14	18	12	18	13	13	13	17

Scores are expressed in percentages.
Comparison: Metro vs. Non-metro; 3-7 yrs vs. 8-14 yrs vs. 15-18 yrs & Users vs. Non-users
Significantly higher at 95% confidence

"I saw the ad on the Facebook and I booked a demo and when the person came and explained me alike he explained me all the positive things."
—*Parents of 8-14 yo, Metro*

"The way they have described this was so good and I liked that so I had made this okay. The teaching method was so good in the brand and they have mentor facility also like if you have any problem then you can take the help of the mentor also."
—*Parents of 3-7 yo, Tier 1*

The pressure of studies seen in EdTech ads is high

Parents, particularly those from non-metros, felt that ads show children in a high-pressure level of studies. They also observed a lot of focus being placed on exams, especially as the target age group moves over 8 years.

Pressure of studies was high

	Total (443)	Metros (191)	Non-Metros (252)	3-7 yrs (122)	8-14 yrs (179)	15-18 yrs (142)
Score	73	68	77	69	75	73
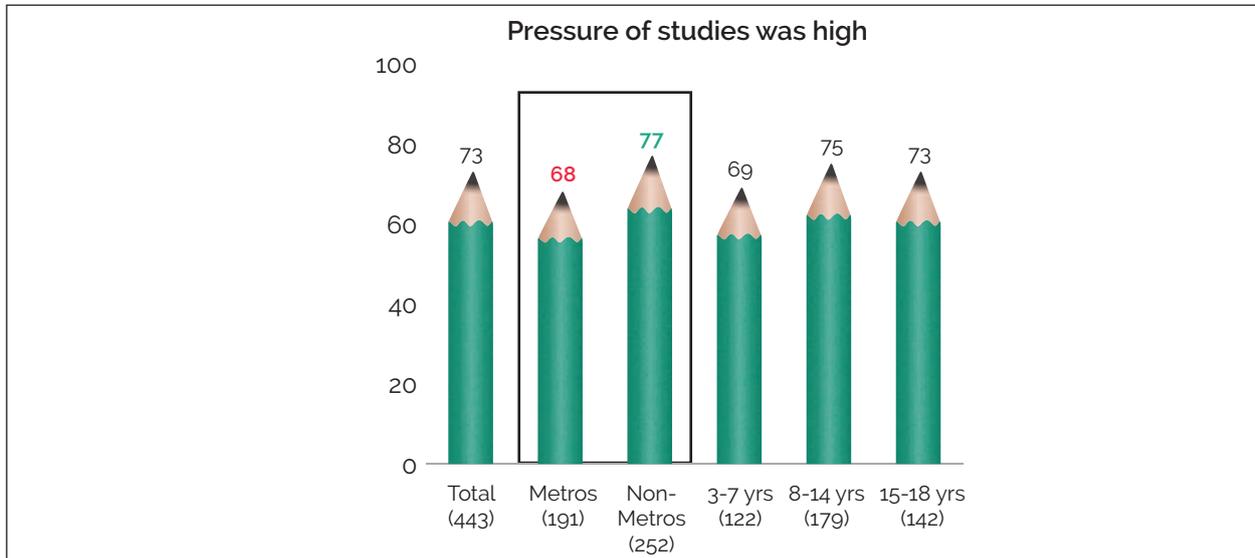
Scores are expressed in percentages.| Comparison: Users vs. Non-users & 3-7 yrs vs. 8-14 yrs vs. 15-18 yrs | Green font indicates significantly higher scores and red font indicates significantly lower scores at 95% confidence

Significant focus on exams in EdTech ads

	Total (443)	3-7 yrs (122)	8-14 yrs (179)	15-18 yrs (142)
Score	78	69	81	82
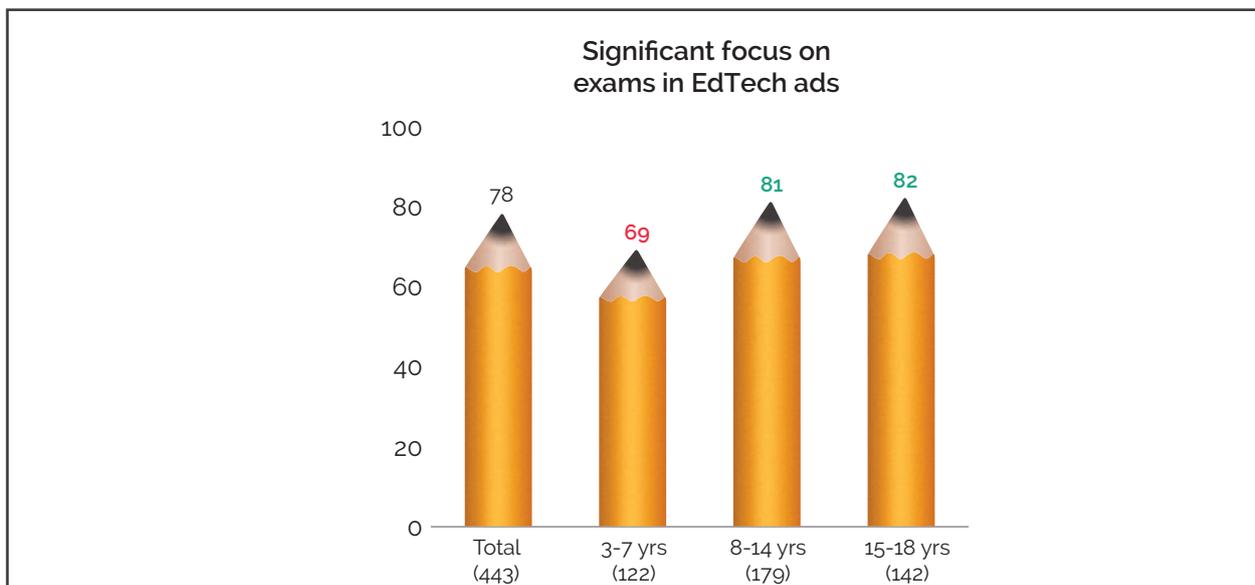
Scores are expressed in percentages.| Comparison: 3-7 yrs vs. 8-14 yrs vs. 15-18 yrs | Green font indicates significantly higher scores and red font indicates significantly lower scores at 95% confidence

"The ads should not have negative messages; it could have an impact, mentally, on parents, on the society and also, the child. Pressure on the parents, on society meaning communities, children, too."
—Parents of 15-18 yo, Metro

"Right, in one class there will be First, second and third rank only, only these will be called toppers. Not all kids are the same. Some kids are toppers education wise, some are toppers in sports and some are toppers in other activities."
—Parents of 15-18 yo, Tier 2

Ads make promises which are difficult to achieve by students

Seven in 10 parents feel that EdTech ads make promises which are difficult to achieve by students. Parents of children in the age group 8-14 years expressed this sentiment more strongly, as did those whose children are existing users of EdTech platforms.

Ads make promises which are difficult to achieve by students

Total (443)	User (305)	Non user (138)	3-7 yrs (122)	8-14 yrs (179)	15-18 yrs (142)
74	78	66	71	79	70
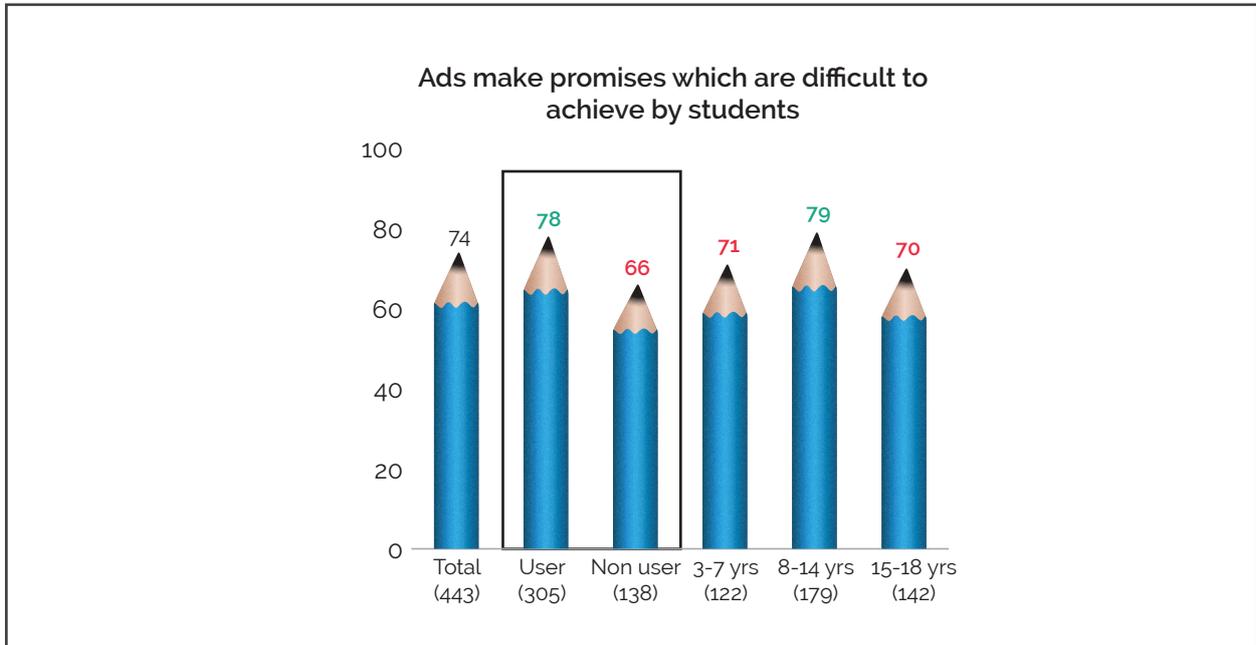
Scores are expressed in percentages.| Comparison: User vs Non User & 3-7 yrs vs. 8-14 yrs vs. 15-18 yrs | Green font indicates significantly higher scores and red font indicates significantly lower scores at 95% confidence

"We have some concerns that whatever they are claiming in the ads and on their website, are they doing that 100% or are they just saying that."
—Parents of 8-14 yo, Metro

"And false promises should not be made, that this will get you a job of 1 Crore. Maybe, one person has got it, but to say that I will make them all champions - these are all false promises."
—Parents of 3-7 yo, Metro

Parents feel a fear of missing out	83 percent of parents felt that the claims and promises made in the ads made them feel their child could miss out on some big achievements if they did not enroll.
Unrelatable situations or characters fail to make the connection	Exaggerated and unrealistic depictions seemed to put off the audience.
Cheap pricing/discounts and refund-related information has lost credibility	Parents are especially wary of claims with respect to fee refund and cheap subscription charges. They understand that these come with a lot of terms and conditions, of which they are not informed at the stage of enrollment.
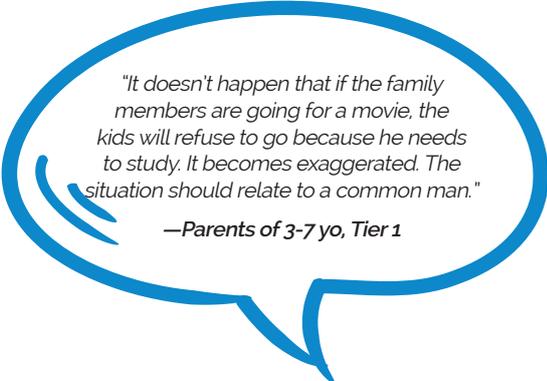
"It doesn't happen that if the family members are going for a movie, the kids will refuse to go because he needs to study. It becomes exaggerated. The situation should relate to a common man."

—Parents of 3-7 yo, Tier 1
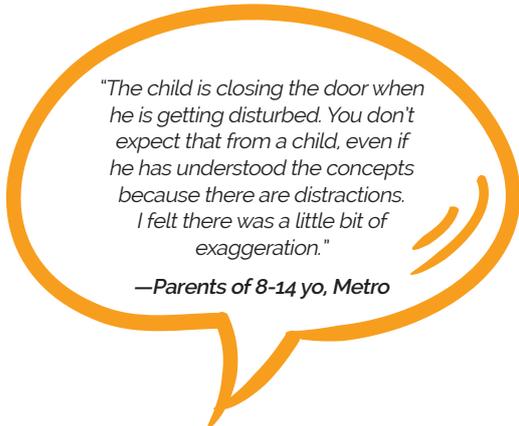
"The child is closing the door when he is getting disturbed. You don't expect that from a child, even if he has understood the concepts because there are distractions. I felt there was a little bit of exaggeration."

—Parents of 8-14 yo, Metro

Characteristics of advertisements that connected well with parents

As part of the quantitative study, parents of children in the age groups 3-7 years, 8-14 years and 15-18 years, were shown randomised reels of advertisements relevant to their child's age. They were then asked questions to rate their response to individual ads, based on a range of parameters, including likeability, credibility, adequate information provided, and meaningfulness. The scores of this rating were then analysed and tied back to the detailed codification to reveal the characteristics of the best-liked and least-liked ads.

"They say that if the child is not learning then they will refund the whole fee. We don't get such a refund and this doesn't happen. This issue is always there. They are sharing it in the ad but this doesn't happen in real life."

—Parents of 3-7 yr olds, Tier 2

"If it is Rs 499, then I wonder, at such a low price, how can they give so much? I think it is bogus; it is not that in-depth knowledge. There is a quality difference between cheap and expensive stuff."

—Parents 15-18 yo, Metro

Ads that performed well

1. Focused on conceptual learning and personalised attention. These ads showcased these attributes through interactive learning, showing attention to clearing doubts, gamification of the curriculum to build interest, and building strong fundamental understanding of concepts.

2. Highlighted the benefits of studying as per one's convenience - studying anytime, anywhere, and at the child's own pace

3. Showcased the joy of learning and showed the child's active interest in learning

4. Chose to show the route to good marks/ better results through conceptual learning

Ads that were least liked by parents

1. Focused more on the promise of good marks/top rank/exams than the process of learning

2. Did not clearly define the route to good marks; inadequate information on the teaching methods

3. Depicted situations where the mood and tone of the ads is serious or the pressure of studying is immense; depiction of the joy of learning is muted.

Expert Speak

Experts acknowledged the potential of EdTech and were keen to see the sector contributing to a better, more holistic outcome for students. They felt that the nature of EdTech can deliver some much-needed and positive directions for education in India.

Showcase joy, celebrate uniqueness	Experts noted that EdTech communication was skewed towards traditional and popularly acceptable domains rather than encouraging curious self-learners inclined towards unconventional career choices. There was a clear preference for ads that celebrated children as being unique and encouraged joy in the process of learning, as opposed to ads that created an intimidating vibe to exams that was equated to 'children going to war.'
Social skills and relationships count	The panel of educationists were also in favour of ads highlighting group learning, as they reinforced the importance of social skills — particularly after the extended isolation forced by the pandemic.
Stories and people that inspire	A need to present more narratives of impact was felt across the panel, particularly stories of success from unlikeliest quarters that can be inspirational to many. Additionally, on celebrity endorsement, the experts agreed that the choice of celebrities should evoke inspiration — and that may be done by highlighting relevant stories — instead of prioritising fame.
Win their trust	All experts felt that the EdTech industry needed to work towards winning the trust of parents. Reliable and non-coercive messaging is a first step in that direction. With the vast asymmetry in financial capability of parents and advertising spends of the key players, the narratives driven by the sector have a deep impact on how parents evaluate and engage with the sector. Therefore, responsible advertising plays a more critical role than ever before.

Industry Speak

|	
The need for a fresh narrative	Industry representatives felt that EdTech is still a new sector. Creators feel that it has the flexibility to shape a fresh narrative without any baggage of the past and therefore, also to course-correct any lapses made earlier.
Finding the balance between the sanctity of a noble profession like education and effective business growth	Industry representatives understand the big dilemma: the ethics or values of education may be seen at odds with those deployed in its marketing and sales tactics, but they believe that self-regulation and working within a framework of appropriate advertising will mark the new direction for EdTech advertising.
Highlighting how EdTech is already making a difference	Industry representatives also call out the need to highlight real life success stories, and all the positive impact of EdTech on students. They also talk about how EdTech can be a good support system for students, especially in senior years, where the stress of competitive exams is higher.
Seeking best advertising practices from other sectors	Creators would like to see best practices from advertising in other sectors being brought to this area, with the overall messaging being not only inspirational, but also driving a sense of excitement in children.
The need for inclusivity is critical	For the EdTech industry, the need of the hour is to think 'What can we do differently?' Inclusivity, as a marketer stated, is another key pillar of the future of EdTech communication, encompassing equitable representation of all academic levels, gender, personality types, socio-economic class, etc.
Continue highlighting how EdTech can help in ensuring children's curiosity and interest in learning	EdTech already communicates how technology and innovative ways of learning can help children understand better at their own pace. They should continue to highlight how the use of interactive learning, gamification, etc. can help children further build on their natural curiosity and learn at a conceptual level.

End Note

Advertising taps into the realities, moments of truth and inherent codes of beliefs and behaviours of consumers. Brands weave their solutions in the context of these realities and beliefs. The purpose of advertising is to align consumers to the brand's world view and nudge them to use the products and services by being meaningful to them. Advertising stories are powerful, they can connect at an emotional level, and help consumers make informed choices.

As seen, EdTech advertising has the potential to present a powerful world view that is progressive and, most importantly, speaks to the emerging aspirations of parents and students — from an ever-widening spectrum of choices and inclusivity to a contemporary idea of parenting.

Going forward, this will also be a key differentiator for companies in this space. It will be interesting to see how the sector infuses new energies to redefine education. To some extent, we see these attempts being made by some EdTech companies. However, these tend to be overshadowed by other narratives that perpetuate some of the current challenges with education in India. We hope this report provides the impetus to reassess the choice of narratives deployed by the EdTech sector. Conversations with the industry show that the intent is right, and it now needs to reflect more powerfully in the advertising as well.

Acknowledgements

Annexure-1

Advisory to Citizens Regarding Use of Caution with EdTech Companies

Posted On: 23 DEC 2021 4:14PM by Press Information Bureau (PIB) Delhi

Given the pervasive impact of technology in education, many EdTech companies have started offering courses, tutorials, coaching for competitive exams, etc., in an online mode. Against this backdrop, parents, students and all stakeholders in school education have to be careful while opting for online content and coaching being offered by a host of EdTech companies. The decision has to be well considered with several dos and don'ts. Most importantly, the offer of free services that are promised by some companies has to be carefully evaluated. It has come to the notice of the Department of School Education and Literacy that some EdTech companies are luring parents in the garb of offering free services, getting the Electronic Fund Transfer (EFT) mandate signed, or activating the auto-debit feature, especially targeting vulnerable families.

Following are some dos and don'ts, which the stakeholders of the education ecosystem may follow:

Do's

1. Avoid the automatic debit option for payment of subscription fee. Some EdTech companies may offer the free-premium business model, where a lot of their services might seem to be free at first glance. To gain continuous learning access, however, students have to opt for a paid subscription. Activation of auto-debit may result in a child accessing the paid features without realising that he/she is no longer accessing the free services offered by the EdTech company.

2. Do read the terms and conditions before acknowledging the acceptance of learning software/device, as your IP address and/or personal data may be tracked.

3. Ask for a tax invoice statement for the purchase of educational devices loaded with contents/app purchase/pendrive learning.

4. Do a detailed background check of the EdTech company that you want to subscribe to.

5. Do verify the quality of the content provided by the EdTech companies, and make sure that it is in line with the syllabus and your scope of study, and is easily comprehensible by your child.

6. Do clarify all your doubts/questions regarding the payment and content before investing any amount for your child's learning in any EdTech company.

7. Activate parental controls and safety features on the device or in the app or browser, as it helps to restrict access to certain content, and limits spending on app purchases.

8. Help your child understand that some features in education apps are used to encourage more spending. Talk to them about possible marketing strategies used by EdTech companies and the consequences.

9. Look for student/parent reviews online on the EdTech company for any registered grievance and marketing gimmicks. Also, provide your suggestions and reviews, which may be beneficial for others.

10. Record evidence of spam calls/ /forced signup for any education packages without complete consent for filing a grievance.

11. Go through the child safety guidelines mentioned in the PRAGYATA guidelines by the Ministry of Education before using any EdTech platform. (https://www.education.gov.in/sites/upload_files/mhrd/files/pragyata-guidelines_0.pdf)

Don'ts

1. Do not blindly trust the advertisements of EdTech companies.

2. Do not sign up for any loans of which you are not aware.

3. Do not install any mobile EdTech applications without verifying their authenticity.

4. Avoid credit/debit cards registration on apps for subscriptions. Place an upper limit on expenditure per transaction.

5. Avoid adding your data like emails, contact numbers, card details, addresses etc. online, as the data may be sold or used for later scam attacks.

6. Do not share any personal videos and photos. Use caution against turning on the video feature or getting on video calls on an unverified platform. Keep your child's safety as the utmost priority.

7. Do not subscribe to unverified courses because of their false promises.

8. Do not trust the 'success stories' shared by EdTech companies without proper check as they might be a trap to gather more audience.

9. Do not allow purchases without parental consent. To avoid in-app purchases, OTP-based payment methods may be adopted as per RBI's guidelines.

10. Do not share your bank account details and OTP number with any marketing personnel. Beware of cyber frauds.

11. Do not click on links or open any attachments or pop-up screens from sources you are not familiar with.

The legal provisions for e-commerce firms are being reiterated here for information to citizens who are consumers of EdTech services.

E-commerce Regulations & Redressal System:

Consumer Protection (E-Commerce) Rules, 2020 were notified by the MINISTRY OF CONSUMER AFFAIRS, FOOD AND PUBLIC DISTRIBUTION (Department of Consumer Affairs) vide NOTIFICATION New Delhi, dated 23rd July, 2020

https://consumeraffairs.nic.in/sites/default/files/E%20commerce%20rules.pdf

At present, EdTech companies have seen rapid growth thereby increasing the number of students/ teachers subscribing to their learning platform. The increasing number also means that platforms must be careful about the claims made regarding the services offered. It is very much evident that the EdTech companies which may be considered e-commerce entities have to comply with the Rules to prevent any untoward liability in the future and need to establish a dedicated mechanism in place to check for compliance with the law.

1. No e-commerce entity shall adopt any unfair trade (marketing) practice, whether in the course of business on its platform or otherwise.

2. No e-commerce company shall falsely represent itself as a subscriber and post reviews about its products or misrepresent the quality or the features of any educational content and its learning tools.

3. Every e-commerce entity shall endeavour on a best effort basis to become a partner in the convergence process of the National Consumer Helpline of the Central Government.

4. All EdTech companies are supposed to have a grievance officer and the name and contact numbers, and designation of the grievance officer who must be resident in India, to ensure compliance with the provisions of the Act or the rules made thereunder for grievance redressal or for reporting any other matter; to be displayed on the platform or website and ensure that the grievance officer acknowledges the receipt of any consumer complaint within forty-eight hours and redresses the complaint within one month from the date of receipt of the complaint.

5. No e-commerce entity shall manipulate the price of the products/courses offered on its platform in such a manner as to gain unreasonable profit by imposing on consumers any unjustified price having regard to the prevailing market conditions, the essential nature of the course, any extraordinary circumstances under which the course is offered, and any other relevant consideration in determining whether the price charged is justified; and discriminate between subscribers of the same class or make any arbitrary classification collecting their personal data/breaching privacy through unfair means affecting their rights under the Act.

6. Every e-commerce entity shall only record the consent of a consumer for the educational product offered on its platform where such consent is expressed through an explicit and affirmative action, and no such entity shall record such consent automatically, including in the form of pre-ticked checkboxes.

7. Every e-commerce entity shall effect all payments towards accepted refund requests of the consumers as prescribed by the Reserve Bank of India or any other competent authority under any law for the time being in force, within a reasonable period, or as prescribed under applicable laws.

Further to complying with the general rules of ASCI's Code for Self-Regulation in advertising, the advertisements of Educational Institutions including the EdTech companies and Programs shall comply with the following guidelines:

1. The advertisement shall not state or lead the public to believe that an institution or course or program is official, recognized, authorized, accredited, approved, registered, affiliated, endorsed or has a legally defined situation unless the advertiser can substantiate with evidence.

2. (a) An advertisement offering a Degree or Diploma or Certificate which by law requires to be recognized or approved by an Authority shall have the name of that Authority specified for that particular field.

   (b) In case the advertised Institution or Program is not recognized or approved by any mandatory Authority but is affiliated to another Institution, which is approved or recognized by a mandatory Authority, then the full name and location of the said Affiliating Institution shall also be stated in the advertisement.

   (c) The name of the Affiliating Institution, as indicated in 2(b), shall not be less than 50% of the font size as that of the advertised Institution or Program in visual media such as print, internet, hoarding, leaflet, prospectus etc., including television. In audio media such as radio or TV the name of the Affiliating institution (if applicable), must be stated.

3. The advertisement shall not state or lead the public to believe that enrolment in the institution or program or preparation course or coaching classes will provide the student with a temporary or permanent job, admissions to institutions, job promotions, salary increase etc. unless the advertiser can submit substantiation to such claim. In addition, the advertisement must carry a disclaimer stating 'past record is no guarantee of future job prospects.' The font size of the disclaimer should not be less than the size of the claim being made in the advertisements.

4. (a) Advertisement shall not make claims regarding extent of the passing batch placed, the highest or average compensation of the students placed, enrolment of students, admissions of students to renowned educational institutes, marks and ranking of students passed out, testimonial of topper students, institution's or its program's competitive ranking, size and qualification of its faculty, affiliation with a foreign institution, Institute's infrastructure, etc. unless they are of the latest completed academic year and substantiated with evidence.

(b) Advertisement stating competitive rank of the institution or its program shall also provide full name and date of the publication or medium which released the rankings.

(c) Visual infrastructure of the Institution shown in the advertisement shall be real and exist at the time of the advertisement's release.

(d) Testimonial of toppers in an advertisement shall be from students who have participated in the testimony program, exams or subject only from the advertising institute.

(e) An advertisement stating the number of passing out students placed for jobs shall also state the total number of students passing out from the placed class.

Government initiatives that may also be explored before the purchase of content

Free e-learning contents/textbooks/digital labs/ for all classes have been made available online ensuring quality and access for all by the Ministry of Education, its autonomous organisations, and all States/UTs. These may be effectively used for learning, and can be accessed here (the complete list is not limited to the links given below).

- https://diksha.gov.in/
- http://www.olabs.edu.in/
- https://swayam.gov.in/
- https://www.nios.ac.in/
- SWAYAM PRABHA TV Channels for class 1 to 12-

  https://www.swayamprabha.gov.in/index.php/schooledu

- Official Learning portals/apps of the States/UTs

To report any untoward incident, please use the following links:

- https://ascionline.in/
- https://consumerhelpline.gov.in/
- https://pgportal.gov.in/

Annexure-2

RAISE Framework Checklist

Relationship with learning

What to check for:

- Does the ad depict holistic learning or is the focus on just the 'curriculum'?
- Is the objective of learning to clear exams or does it provide for discovery and a love for learning?
- Does the depiction motivate the child to take learn more?
- Does the ad depict an environment that is too disciplinary/strict and doesn't allow for the student's expression of interest?
- Does the ad depict the student's voice in terms of their active interest in learning?
- Is the tone of the ad serious and stressful or war-like?
- Are exams shown as a big hurdle to cross?
- Does the ad depict any parental pressure on students, either directly or indirectly?
- Is the teacher's demeanour authoritative and imposing?
- Does the ad highlight that failure is not an option?

Authenticity of situations, promises and claims

What to check for:

- Is the ad able to present genuine situations or case studies as proof of learning and development of past students?
- Are offerings like free-classes/assessments, combination of courses, etc. communicated clearly without any strings attached?
- Are details like course fees, all inclusions and extra offerings communicated clearly in the ad?
- If stories of achievement or inspirational personalities are featured, are they genuine and relatable?
- Does the ad create any sense of 'false scarcity' or unnecessary urgency that may play on parents' anxieties or a student's fear of missing out?
- Does the ad take the age-old 'topper endorsement' route that may make parents/students feel that the programme will make their child definitely succeed like it did for the topper?
- Does the ad use superlatives such as 'best, 'most valued', 'top' etc., without any verifiable or credible data to support the claim?

Inclusive representation of situations, students, teachers, parents and other characters

What to check for:

- Does the ad/campaign depict kids across diversities – gender, age, physical attributes, regional ethnicities, socio-economic status etc.?
- Does the ad give a voice to each child, even the less confident or 'low scorers', to express their interests and aspirations?

- Is the teacher depicted as being an integral part of learning?
- Is the teacher shown to fuel students' interest in learning?
- Does the ad show teachers who are empathetic to students?
- Does the ad/campaign reinforce any gender bias by focusing more on boys, especially in subjects such as maths?
- Does the ad reinforce stereotyping of students in terms of attitude, attire, accessories, behaviour, gender or regional ethnicity?
- Does the ad reinforce stereotyping of parents vis-a-vis their gender, roles or life- stage?

Spectrum of pedagogy

What to check for:

- Does the ad depict holistic and conceptual learning?
- Does the ad present a learning method that can be personalised/adapted for each student to learn at their own unique pace?
- Does the ad encourage peer-to-peer learning?
- Does the ad showcase interesting teaching and learning techniques that students can benefit from?
- Does the learning method evoke a sense of curiosity and encourage creativity among students?
- Does the ad depict or insinuate rote learning in any way?
- Is the ad focussed on preparing solely for exams and associated competition with others?

Excellence markers depicted in the ad

What to check for:

- Does the ad celebrate small successes or focuses only on big wins?
- Does the ad focus enough on the academic progress and overall development of the child?
- Does the ad tell enough real-life and diverse success stories?
- Is the motivation to compete internal (competing with oneself and bettering their best) or external (competing against others and beating them)?
- Does the ad highlight superlatives in a manner that can pressurise students?
- Is the ad focused mainly on the outcome of exams and securing top marks?
- Does the ad concentrate on depicting toppers and winners?
- Does the ad showcase any outcomes that may be construed as extraordinary/ unrealistic?
- Does the ad depict that kids who score well receive more love and appreciation?
- Does the ad show students who score low as demotivated or depressed?
- Does the ad imply that failure is not an option?

This framework should be referred to at all stages of creative development — right from concept ideation and script development to creative testing and script finalisation. The RAISE checklist will help marketers and creative experts to review concepts at an early stage and incorporate ideas that best apply according to their creative route, and weed out any red flags that could bring down their own standing in the consumer's eyes. When used effectively, the framework can raise the overall quality of EdTech advertising to represent a balance between business growth and consumer expectations and aspirations.

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Byju's "SamjhoSeekhoJeeto"

Byju's "Shahrukh Khan BYJU'S Doubt (punjabi)"

Byju's "Shahrukh Khan BYJU'S Forever Yaad rehta hai (Gujarati)"

Byju's "Discover Why #ChampsStartEarly With Neeraj Chopra"

Byju's "Champs Start Early | BYJU'S For Young Learners - Feat. PV Sindhu"

Aakash Byju's "Vijayi Bhava"

Aakash Byju's "LetsWinTogether""

Byju's "Tuition - doubt solving"

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Byju's "Two Teacher Advantage"

Byju's "Conceptual Clarity"

Byju's "Tuitions redefined"

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Eduauraa "Ab future pe sabka haq"

Eduauraa "Ranveer-Eduauraa-Zee tie up (Best Guidance from India's Top Teachers)"

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Extramarks "Extramarks Hai Toh Funda Clear Hai"

Extramarks "Learning is Fun with Extramarks - The Learning App"

Extramarks "NEET 2022 crash course"

Extramarks "IIT JEE Exams are now online"

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Extramarks "Rediscover the Joy of Learning"

Gradeup "Structured Study Plan"

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Toppr Ad "Friends | Switch to Soching"

Toppr "Coaching se nikalo, soching mein daalo"

Testbook "TOI Chennai Print ad"

Testbook "Doubts are good"

Testbook "Every student is unique"

Toppr "Sisters | Switch to Soching"

Toppr "End the class struggle"

Toppr "Happy Teachers' Day!"

Toppr "Ask your doubts now"

Unacademy "For the Passionate (cricket)"

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Unacademy "For the Determined (restaurant)"

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About the Lead Writer

Parul Ohri

Parul is a communications and content expert with over 20 years of wide-ranging experience in the areas of public relations, print and publishing, corporate communications and digital content creation across text and video, including scripting and producing several critically acclaimed video campaigns. Parul was part of the founding team of Momspresso, and served as their Chief Editor for more than 12 years, bringing to the table the unique 'mums' perspective and her vast experience with content creation.

Parul credits her two daughters for unleashing her creative side like never before, and also making her acutely aware of the kind of world they are growing up in vis-a-vis what it should be. Today, having played the roles of mother, writer, actor, TedX speaker, filmmaker and talk show host, Parul is mindful of the impact of every message going out. Her written and visual work has primarily been in the areas of parenting and breaking gender stereotypes.

About the Artist

Kosha Bathia

Kosha Bathia is an independent illustrator, graphic designer and creative consultant, with more than a decade of experience in the industry. She is also the author of the published book, 'Me Time: My Quarantine Journal' available worldwide on Amazon.

Kosha conducts creative workshops online for various organisations, which give the employees a much-needed break, and tools to de-stress and express themselves creatively.

Being a visual storyteller, her passion lies in creating authentic and meaningful content through her artwork. She works with various leading agencies, design houses, corporates and clients from different industries to provide illustrations for projects like children's books, character designs, comic books, branding and communication, T-shirt designs, social media creatives, editorials, corporate and advertising creatives, and much more.

When she's not working, she can be found reading, meditating or playing with the family cat.

Her work can be seen on instagram.com/koshabathia and https://linktr.ee/koshabathia.

About the Research Partner

Sprint Studio.ai is a new age research tech agency with a vision of introducing new and fresh approaches to research. They have built an 'on-the-go' conversational research platform where brands and researchers can directly connect with consumers. Sprint Conversations App has launched chat style surveys, video conversations and interactive communities on the same platform, breaking research silos and introducing immersive and media-rich insights.

The transformation envisaged by the team is multi-fold. Interactive communities help build longitudinal data and make continuous feedback from consumers possible. Chat-style surveys (WhatsApp look like) help reach lower SECs, which online panels don't provide today. Video conversations are now possible anytime and anywhere, and they also come with some really rich features like video highlights and library on the mobile.

There was an urgent need to reshape and refresh how and what is measured in research. Sprint studio. ai have launched a unified brand and communication framework that builds newer measurements such as behavioural sciences into the methodology. A team built by ex-Kantar specialists, brand and communication is at the heart of what they do.

Their goal is to make clients ask more and listen to more of what consumers say.

They are one of the top 20 women-founded startups picked by Google for Google Accelerator 2022. www.sprintstudio.ai

About ASCI

Established in 1985, The Advertising Standards Council of India (ASCI) is the self-regulatory body of the Indian advertising industry. ASCI resolves issues around

- Dishonest or misleading ads
- Indecent or offensive ads
- Harmful ads
- Ads that are unfair in competition

ASCI looks at advertisements across all media types and formats such as TV, print, digital, outdoor, radio, point of sale, claims made on packaging, etc.

ASCI works closely with different stakeholders in the matter of consumer protection. ASCI's code is part of The Advertising Code enshrined within the Cable TV Networks (Regulation) Act, 1994, providing it with a legal backstop.

Complaints management

ASCI's speedy, independent and low-cost complaint management approach ensures that both consumers and industry have the opportunity for a fair resolution. All stakeholders can register their complaints at no cost via WhatsApp at 77100-12345, or at www.ascionline.in

ASCI's independent jury (The Consumer Complaints Council, or CCC) comprises 40 eminent professionals, both from the industry as well as from civil society. They review complaints on a weekly basis and provide their recommendations.

Four retired high court judges hear appeals from complainants or advertisers who may wish to contest a CCC recommendation.

Eminent technical experts from more than 20 fields support the CCC and the Review Panel.

Training and advisory services

With a view to supporting the industry to get it right, ASCI has several initiatives such as the ASCI Masterclass and Advertising Advice (AA).

ASCI has long-established expertise in the area of advertising depictions, claims and representations, through its extensive panel of advertising and technical experts. ASCI's AA panel comprises advertising and technical experts who are well-qualified and experienced specialists from several disciplines such as ayurveda, formulations, microbiology, electronics, market research, nutrition, financial services, etc. Many organisations voluntarily submit their ads at the pre-production stage to ASCI, and receive non-binding advice on whether the ad could potentially violate any ASCI code. Small changes at the production stage can save a lot of hassle later.

The advisory services provided by ASCI are not binding on the advertiser or its independent jury, the CCC.

ASCI also offers an Endorser Due Diligence service to help endorsers meet their obligations to ensure that ads they feature in do not make misleading claims and potentially violate the law.

ASCI | The Advertising Standards Council of India

Download the report on https://ascionline.in/ednext-study.pdf

For queries email us at contact@ascionline.in