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Indonesia Private Tutoring Report 2026

A map of tutor supply, subject demand, and how the country learns.

Data window: 2026-02/2026-06 Coverage: Indonesia 32 min read 33 pages

ABSTRACT

Indonesia's private tutoring market in 2026 draws its tutor supply from Java's education corridor, with demand led by Mathematics, English, and Science. In-person learning stays dominant while online lessons grow to roughly one in five sessions. This report maps the current state using indexed data and official statistics.

Executive Summary

Private tutoring holds an important place in Indonesia's learning ecosystem. Between formal schooling and informal learning at home, it acts as a flexible companion — closing the distance between a classroom curriculum and each child's needs. This report captures the state of that market in the first half of 2026 through two data lanes: indexed internal analysis and directly cited official statistics.

On the supply side, prospective tutors concentrate along Java's education corridor, in line with the national student distribution led by West Java, East Java, and Central Java. On the demand side, three academic pillars — Mathematics, English, and Science — lead, with national selection exams forming a cluster that strengthens each admissions season.

Learning still leans toward in-person sessions, which hold around three-quarters of the total, while online classes grow to roughly one in five as internet penetration passes three-quarters of the population. Beyond core subjects, a new wave of interest emerges: music, public speaking, artificial intelligence, and programming.

All internal figures are presented in indexed form to preserve confidentiality, while factual claims rest on official sources. This report is a single-period snapshot; future editions will broaden the time range so long-term trends become readable.

Key Findings

1. Private tutor supply concentrates in Java's campus corridor — led by West Java, East Java, and Central Java, in line with the national student distribution.
2. Demand is led by Mathematics, followed by English and Science; test preparation forms a distinct cluster.
3. In-person learning dominates around three-quarters of sessions, while online classes reach roughly one in five.
4. Tutors come from teacher-training universities (LPTK) and leading state universities, mostly at undergraduate level.
5. New interests beyond core academics are rising: music, public speaking, artificial intelligence, and programming.

01 External sources (cited)

Introduction: Indonesia's Learning Landscape

> Private tutoring occupies Indonesia's non-formal and informal education space, complementing formal schooling with flexible, personal guidance.

Indonesia's education system rests on three complementary pathways. Law No. 20 of 2003 on the National Education System recognizes formal education (graded schools and universities), non-formal education (courses, tutoring, and structured training outside school), and informal education (independent learning in the family and community). Private tutoring lives at the crossing of the last two: as structured as a course, yet as intimate as learning at home.

THREE EDUCATION PATHWAYS

Formal: graded education in schools and universities. Non-formal: courses, tutoring, and structured training outside school. Informal: independent learning in the family and community. Private tutoring bridges the non-formal and informal pathways.

This crossing is precisely why private tutoring thrives. Where one formal classroom must serve dozens of students at a single pace, tutoring adapts its tempo to one child. It patches missed material, accelerates the ready, and accompanies the major exams that decide the next level.

This report maps Indonesia's private tutoring market in early 2026: where tutors come from, which subjects are most sought, how families choose their mode of learning, who the tutors are, and how cost is structured. The aim is to build an honest data reference for a sector long discussed yet rarely measured.

Scope and reading

The scope is Indonesia's private tutoring market nationwide, focusing on school grades and university-entrance preparation. The formal sector appears as comparative context. Every internal figure is presented in indexed form — as

market structure and direction, not absolute counts — while external facts are cited from official sources and clearly marked.

02 External sources (cited)

Context: Education Demand and Digital Readiness

> Household education spending climbs with each level, internet penetration passes three-quarters of the population, and national selection keeps demand high.

Demand for private tutoring is rooted in families' decisions to invest in their children's education. Statistics Indonesia (Susenas MSBP 2024) shows household education spending climbing sharply with each level — a burden that pushes families to seek guidance so every rupiah bears fruit.

Average annual household education spending by level (BPS, Susenas MSBP 2024)

Level	Average per year
Primary school (SD)	± IDR 4.6 million
Junior high (SMP)	± IDR 7.3 million
Senior high (SMA)	± IDR 10.2 million
Higher education	± IDR 19.0 million

Source: BPS, Education Support Statistics 2024 (Susenas MSBP, September 2024 survey of 76,310 households across 38 provinces). The largest components at school level are allowance, transport, and tuition.

This rising burden explains why families weigh tutoring as an investment rather than a mere expense. With high education costs looming, early preparation feels rational.

Digital readiness

Room for online learning to grow rests on an increasingly mature digital infrastructure. The 2024 survey by the Indonesian Internet Service Providers Association (APJII) recorded national internet penetration of 79.5 percent, equal

to 221.5 million people, with urban areas (82.2 percent) ahead of rural ones (74 percent). This urban–rural gap shapes who can access online classes.

> INTERNET PENETRATION 2024
>
> **79.5% of Indonesians are connected to the internet (221.5 million people) — urban 82.2%, rural 74%.**
>
> — APJII, Indonesia Internet Penetration Survey 2024

National selection as a driver

At the peak of demand sits university admissions. Its participant scale is large and consistent year after year, keeping the wave of test-preparation demand strong. A dedicated chapter explores it further.

03 External sources (cited)

Curriculum Context: A Changing Learning Environment

> A national curriculum emphasizing literacy, numeracy, and self-directed learning shapes the environment where private tutoring operates as a companion adapting to each child's pace.

Private tutoring does not work in a vacuum; it adapts to the curriculum in force at school. Through Regulation of the Minister of Education, Culture, Research, and Technology No. 12 of 2024, the Merdeka Curriculum was established as the national curriculum for early childhood, primary, and secondary education, starting in the 2024/2025 school year.

NATIONAL CURRICULUM 2024

Permendikbudristek No. 12/2024 establishes the Merdeka Curriculum as the national curriculum framework. Its rollout reaches more than 300,000 education units, around 80 percent of formal schools, with transition periods varying by regional conditions.

The curriculum emphasizes strengthening literacy and numeracy and self-directed learning at a more flexible pace. The focus on literacy and numeracy aligns with the domains measured by international assessments, and with the three pillars of tutoring demand — Mathematics, Language, and Science.

In an environment that allows for varied learning speeds, private tutoring finds its role as a companion adapting the pace to each child: deepening the challenging, accelerating the ready, and linking school material to individual needs.

A CURRICULUM COMPANION

A curriculum emphasizing literacy, numeracy, and self-directed learning gives private tutoring a clear role: translating curriculum goals into each student's pace and needs.

Source: Permendikbudristek No. 12/2024 on the Curriculum for Early Childhood, Primary, and Secondary Education; EduPoint internal analysis (indexed).

04 External sources (cited)

National Learning Outcomes: Why Guidance Is Needed

> Indonesia's learning outcomes sit below the international average, and most students have yet to reach minimum proficiency — a gap that explains the need for learning support.

Indonesia's education system is vast. In the 2024/2025 school year, Statistics Indonesia recorded 52.9 million students taught by around 3.38 million teachers. At this scale, one teacher often faces dozens of students at once, making individual attention scarce — a gap that learning support bridges.

PISA 2022 scores: Indonesia vs OECD average

Domain	Indonesia	OECD average
Reading	359	476
Mathematics	366	472
Science	383	485

Source: OECD, PISA 2022 Results (Country Note: Indonesia). All three domains sit well below the OECD average.

The 2022 Programme for International Student Assessment (PISA) places Indonesia's outcomes well below the OECD average in reading, mathematics, and science. Indonesia's ranking did rise 5–6 positions versus 2018, but that gain came because many countries fell further post-pandemic; Indonesia's absolute scores actually declined — reading down 12 points and mathematics down 13 points since 2018.

> NUMERACY PROFICIENCY
>
> **Only about 18% of Indonesian students reach the minimum numeracy proficiency level under PISA 2022 standards.**

— OECD, PISA 2022

This gap is the structural root of private tutoring demand. When most students have yet to reach minimum proficiency, families seek guidance to close the distance between what is taught and what is truly mastered. Private tutoring becomes a family's mechanism to respond to the gap left by large classes.

Source: OECD, PISA 2022 Results (Indonesia); Pusmendik, Ministry of Education; BPS, Education Statistics 2024.

05 External sources (cited)

Education Participation and Equity

> School participation in Indonesia is near-universal at the primary level, then narrows at secondary levels — these transition points matter most, and most often come with learning support.

Access to education in Indonesia is widest at the primary level. Statistics Indonesia recorded a Net Enrollment Rate (APM) for primary school of 97.89 percent in 2024 — nearly every child aged 7–12 is enrolled on time.

PRIMARY-LEVEL PARTICIPATION

The primary-school net enrollment rate reached 97.89% in 2024 — only 2.11% of primary-age children are not enrolled on time.

— BPS, Net Enrollment Rate 2024

Participation narrows at higher levels. The net enrollment rate declines from primary to junior and senior secondary, a pattern confirmed by BPS. Each drop marks a level transition — a moment that demands adapting to harder material and facing tighter admissions competition.

These transition points shape the learning journey most: entering junior high, entering senior high, then university selection. At these junctures families most often seek guidance, because the jump in material and the stakes of selection feel largest. Private tutoring demand pulses to the rhythm of these transitions.

TRANSITIONS AS INVESTMENT POINTS

Learning support is most sought at level-transition junctures. Understanding this rhythm helps families plan, and helps providers arrive on time.

Source: BPS, Net Enrollment Rate by Province and Education Level 2024; EduPoint internal analysis (indexed).

06 External sources (cited)

Educational Attainment and Family Aspirations

> The average Indonesian adult has schooling equivalent to junior high, while today's children are expected to reach senior high — an aspiration gap that drives investment in learning.

Indonesian families' educational aspirations rise from one generation to the next. Statistics Indonesia recorded Mean Years of Schooling for the population aged 25 and above at 8.85 years in 2024 — equivalent to the early grades of junior secondary. At the same time, Expected Years of Schooling for a 7-year-old reached 13.21 years, equivalent to senior secondary through early diploma.

Indonesia HDI education indicators 2024 (BPS)

Indicator	2024 value
Mean Years of Schooling (25+)	8.85 years (≈ junior high)
Expected Years of Schooling (age 7)	13.21 years (≈ senior high/D1)
Human Development Index	75.02

Source: BPS, Human Development Index 2024 (released November 2024).

The gap between the parent generation's attainment and the child generation's expectation is the heart of family aspiration. Parents who studied to around junior high strive to take their children further — to senior high, then university. That striving grows the demand for learning support.

> **THE ASPIRATION ENGINE**
> Every family wants its child to surpass the level the parents reached. The gap from 8.85 to 13.21 years maps that aspiration — and private tutoring is one way to cross it.

Indonesia’s Human Development Index rising to 75.02 in 2024 shows a consistent direction of improvement. Education is one of its main pillars, and household investment in children’s learning helps sustain this progress.

Source: BPS, Human Development Index 2024; EduPoint internal analysis (indexed).

07 External sources (cited)

Education Outcomes in the Labor Market

> Higher educational attainment is associated with better employment prospects — a payoff that reinforces families' drive to take their children as far as possible.

Families' educational aspirations rest on a real calculation: outcomes in the labor market. Employment data from Statistics Indonesia shows that university graduates carry the lowest open unemployment rate among education levels in the recent period.

Open unemployment rate by highest education level (BPS)

Level	Unemployment rate
University	5.86%
Vocational high (SMK)	11.83%
General high (SMA)	15.04%

Source: BPS, Open Unemployment by Highest Education Attained. Figures reflect the relevant release period.

This gap sends a strong signal to families: pursuing higher education is associated with better job prospects. That calculation thickens families' willingness to invest in learning support, especially ahead of the university selection that serves as its gateway.

> **THE INVESTMENT LOGIC**
> Higher education is associated with lower unemployment. For families, the cost of learning support today is an effort toward wider opportunity tomorrow.

A balanced reading still matters: a degree is no sole guarantee, and practical skills remain valuable on many paths. Yet the direction of the data is consistent — higher education levels open wider opportunity, and that is one of the main reasons families pursue them.

Source: BPS, Open Unemployment by Highest Education Attained; EduPoint internal analysis (indexed).

08 Indexed internal + external sources

Tutor Supply: Java's Campus Corridor

> Tutor supply concentrates along Java's education corridor, led by West Java, East Java, and Central Java in line with their large student populations.

The distribution of prospective tutors mirrors the national university map. West Java holds the highest supply index, in line with its largest student population in Indonesia, followed by East Java and Central Java. Jakarta appears as the capital hub, while the Special Region of Yogyakarta stands out for its high student density relative to its size.

Private tutor supply index by province (top province = 100)

Relative index, leading province = 100, aligned with the national student distribution. Absolute counts are not shown; provinces with small samples are hidden for representativeness.

This pattern aligns with Indonesia's higher-education structure. According to the Higher Education Database (PDDikti) and Statistics Indonesia (BPS), the largest student population sits in West Java, followed by East Java and Central Java; Yogyakarta is known as the densest student city despite its small size. This corridor feeds graduates and final-year students into the tutoring world.

> MARKET READING
>
> Tutor supply grows most readily around campus centers. This index describes the national market structure, not any single point, and rests on

official student-distribution data to stay free of sampling distortion.

Provinces with small samples are withheld to preserve representativeness. The implication is clear: the supply of qualified tutors is thickest along Java's corridor, while developing regions call for a different outreach strategy — a national market dynamic discussed in the regional chapter.

Source: EduPoint internal analysis (indexed), aligned with the national student distribution; PDDikti & BPS, Higher Education Statistics 2025.

09 Edupoint internal analysis (indexed)

Demand: Three Academic Pillars

> Private tutoring demand rests on Mathematics, English, and Science, with test preparation forming a distinct demand cluster.

Mathematics is the most requested subject, cementing its place at the core of Indonesian families' learning needs. English and the Science group (general science, physics, chemistry) follow closely behind.

Private tutoring demand index by subject cluster (Mathematics = 100)

Relative demand index, top cluster = 100. Indonesian and English labels are merged; absolute counts are not shown.

Beyond those three pillars, test preparation — logical reasoning, academic aptitude tests, verbal and numerical ability — gathers into a real demand cluster. Quran reading and public speaking round out the range of family needs, showing that private tutoring serves more than report-card grades.

WHY MATHEMATICS LEADS

Mathematics is cumulative: one missed concept blocks the next. This compounding nature makes families quickest to seek help when a child falls behind — giving it the thickest demand.

Demand is shown as a relative index across clusters, revealing the order of needs without exposing raw volumes. Each cluster is examined further in the subject deep-dive chapter.

Source: EduPoint internal analysis (indexed), private tutoring demand February–June 2026.

10 Indexed internal + external sources

Deep-Dive: The Three Subject Pillars

> Mathematics, English, and Science lead demand because each gates the next level while ranking among the most challenging for Indonesian students by international measures.

The three leading pillars are no accident. Each gates the next level and each is a domain measured by PISA — and on all three, Indonesia's outcomes sit below the international average. That distance most often pushes families to seek guidance.

Mathematics: the cumulative core

Mathematics is cumulative: a missed concept blocks the one above it. This staged nature lets gaps pile up quickly, so families act fastest once a child stalls. Indonesia's mathematics score in PISA 2022 was 366, far below the OECD average of 472, underscoring wide room for improvement.

English: a global language, a national need

English is the gateway to higher education, global literature, and cross-border work. The national curriculum introduces it early, while families' aspirations for international study and careers thicken demand. The reading literacy measured by PISA 2022 — a score of 359 against the OECD average of 476 — shows a literacy challenge felt in language learning too.

Science: the literacy that decides

Science trains the evidence-based thinking many further-study paths require. Indonesia's science score in PISA 2022 was 383, below the OECD average of 485. The science group — physics, chemistry, biology — holds steady demand, especially ahead of admissions to science and health programs.

> THE COMMON THREAD

> All three pillars share one pattern: heavy weight in selection, an inherently challenging nature, and national outcomes still below the international average. That combination makes them the core of tutoring demand.

Source: OECD, PISA 2022 Results (Indonesia); EduPoint internal analysis (indexed).

11 External sources (cited)

Test Preparation: The SNBT/UTBK Wave

> National university selection draws hundreds of thousands of candidates each year at high selectivity, becoming the main driver of test-preparation demand.

Test preparation is a demand cluster with an annual rhythm and a large scale. At its center is the National Selection Based on Test (SNBT) via the Computer-Based Written Exam (UTBK), the main gateway into state universities.

UTBK-SNBT 2025 statistics (SNPMB)

Indicator	Count
Registrants	860,976
Sat the exam	829,790
Admitted	253,421
Selectivity	± 29%

Source: SNPMB (National Selection for New Student Admissions), UTBK-SNBT 2025 Data.

These numbers explain the strength of test-preparation demand. At about 29 percent selectivity, nearly seven of ten registrants do not pass through this path — pressure that pushes families to prepare children well in advance.

> SNBT 2025 SELECTIVITY
>
> **Of 860,976 registrants, 253,421 were admitted — about 29% accepted. This competition drives demand for test guidance.**
>
> — SNPMB, UTBK-SNBT 2025 Data

The material tested — general reasoning, quantitative knowledge, Indonesian and English literacy, and mathematical reasoning — overlaps directly with the internal

demand clusters from the previous chapter, especially test preparation and Mathematics. Test-preparation demand peaks in the first half of the year, following the selection calendar.

Two paths, one gate

SNBT is not the only door. The achievement path — National Selection Based on Achievement (SNBP) — screens students on report-card records and accomplishments, and its demand is growing too. In 2025, finalized SNBP registrants reached 776,515 students, up 10.6% from the prior year, competing for 181,425 seats, with 173,028 students admitted.

SNBP 2025 statistics (achievement path)

Indicator	Count
Eligible students	951,675
Finalized registrants	776,515
Seats available	181,425
Admitted	173,028

Source: SNPMB, SNBP 2025 Selection Results. Registrants rose 10.6% from 702,312 (2024).

Together, these two paths — achievement via SNBP and test via SNBT — form a selection season that captures families' attention every early year, and the main driver of demand for both test preparation and ongoing academic support.

Source: SNPMB, UTBK-SNBT 2025 and SNBP 2025 Data; EduPoint internal analysis (indexed).

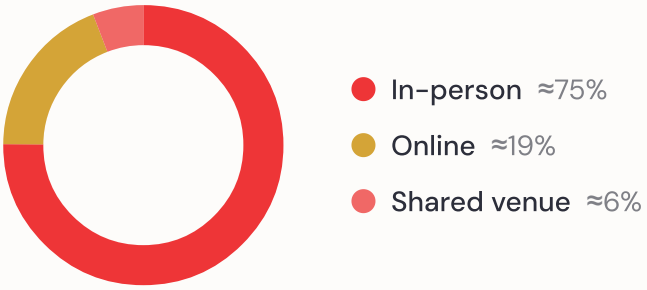
12 Indexed internal + external sources

Mode of Learning: In-Person and the Online Shift

> In-person learning dominates around three-quarters of sessions, while online classes have grown to roughly one in five.

Indonesian families still lean toward direct meetings between tutor and student at home. Around three-quarters of sessions choose the in-person format, with a small share using shared learning venues.

Share of private tutoring learning modes



Relative share across modes (percent). Based on internal demand composition, February–June 2026.

Online learning holds roughly one in five sessions. Its room to grow is supported by national internet penetration of 79.5 percent in 2024, though the urban–rural gap leaves work to be done on equitable access.

BALANCING TWO WORLDS

In-person learning excels in warmth and direct oversight; online excels in reach and flexibility. Indonesia's 2026 market balances both, with in-person as the backbone.

Source: EduPoint internal analysis (indexed); APJII, Indonesia Internet Penetration Survey 2024.

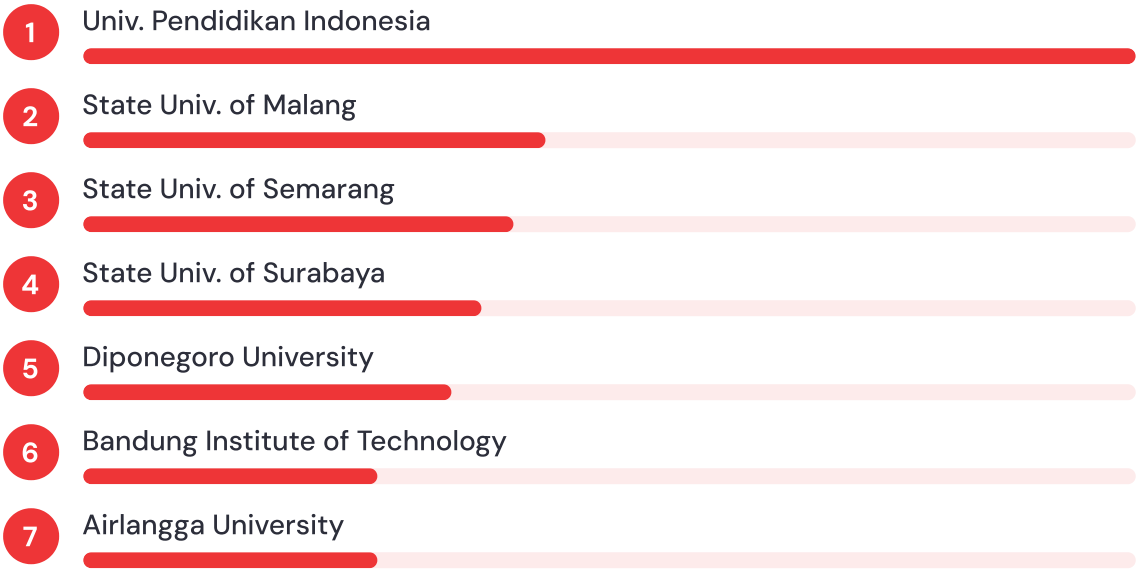
13 Indexed internal + external sources

Tutor Profile: Teacher-Training and Leading State Universities

> Indonesia's private tutors come from teacher-training universities (LPTK) and leading state universities, mostly at the undergraduate level.

Tutors' educational backgrounds are dominated by teacher-training institutions — education universities and former teachers' colleges — which exist precisely to prepare educators. Universitas Pendidikan Indonesia is the most represented, followed by the state universities of Malang, Semarang, and Surabaya.

Tutor home-campus representation index (top contributor = 100)



Relative index, leading campus = 100. Absolute counts are not shown.

Science and technology state universities add their color too, from the Bandung Institute of Technology to Airlangga, Diponegoro, and Gadjah Mada. The level mix shows most tutors hold undergraduate degrees, with a small share at postgraduate level.

QUALITY IMPLICATION

> The dominance of teacher-training campuses means many tutors carry formal pedagogy, not only mastery of the material. This is important capital for consistent guidance quality.

Source: EduPoint internal analysis (indexed); PDDikti, Higher Education Statistics 2025.

14 Indexed internal + external sources

The Teaching Workforce and Guidance Quality

> With millions of teachers in the formal system and qualification standards continually enforced, guidance quality rests on the tutor's pedagogical background.

Guidance quality is rooted in who teaches. In the formal system, Indonesia oversees around 3.38 million teachers (BPS, 2024). Their professional standard is set by Law No. 14 of 2005 on Teachers and Lecturers, which requires a minimum academic qualification of a four-year diploma or bachelor's degree plus an educator certificate.

PROFESSIONAL TEACHER STANDARD

Law No. 14/2005 sets that teachers must hold a minimum D4/S1 qualification and an educator certificate. The government continues to run qualification and certification programs.

In private tutoring, the tutor-profile findings show a dominance of teacher-training (LPTK) graduates. This background brings formal pedagogy, important capital for consistent guidance. Quality still varies between individuals, so tutor selection and development are the deciding factors in service quality.

Source: BPS, Education Statistics 2024; Law No. 14/2005 on Teachers and Lecturers; EduPoint internal analysis (indexed).

15 Indexed internal + external sources

Cost, Access, and Equity

> Tutoring cost moves with a city's cost of living — major metropolitan areas highest, regional cities as the base — amid a rising household education burden.

The cost structure of private tutoring follows a city's economic landscape. Major metropolitan areas, led by Greater Jakarta, occupy the highest cost level. Big cities such as Surabaya, Medan, Bandung, and the Bali region sit at a middle level, while regional cities serve as the comparison base.

Relative private tutoring cost index across city tiers (base city = 100)

Illustrative relative index, regional city = 100. Not a rupiah rate; reflects the direction of cost aligned with city cost of living.

This pattern aligns with rising household education spending. The burden climbing from primary to higher education places tutoring cost within an increasingly careful family calculation.

> **ON EQUITY**
>
> The concentration of tutor supply in Java's corridor and costs that track city living raise questions of equity. Online classes could shorten the access gap, provided digital infrastructure reaches developing regions.

Source: EduPoint internal analysis (indexed); BPS, Education Support Statistics (Susenas MSBP) 2024.

16 Indexed internal + external sources

Regional Deep-Dive: Three Faces of the Market

> The private tutoring market shows three regional faces — metropolitan Greater Jakarta, Java's corridor, and developing regions beyond Java — each with different supply, cost, and access dynamics.

Reading the market nationally hides its regional variety. Three regional faces emerge when supply, cost, and access are read together.

Greater Jakarta: highest demand and cost

The capital region holds the highest cost level in line with its cost of living, with dense, differentiated demand — from school academics and test preparation to new skills. Jakarta serves as a supply hub, fed by the overflow of graduates from Java's surrounding corridor.

Java's corridor: the thickest supply

West Java, East Java, Central Java, and Yogyakarta form a corridor with the thickest tutor supply, in line with the national student distribution. Cost sits at a middle level, and the depth of the tutor pool enables more specific matching between need and expertise.

Beyond Java: a growing market

Beyond Java, the market is in a growth phase: real learning needs, while the depth of local tutor supply is still developing. Here online classes act as a bridge — shortening the distance between families and quality tutors, provided digital infrastructure reaches them. Equitable access is the leading agenda for this region.

> ONLINE AS AN EQUALIZER

> The three regional faces meet at one shared solution: online learning can equalize access to quality tutors across regions, making the equitable spread of digital infrastructure the key.

Source: EduPoint internal analysis (indexed); PDDikti & BPS, Higher Education Statistics 2025.

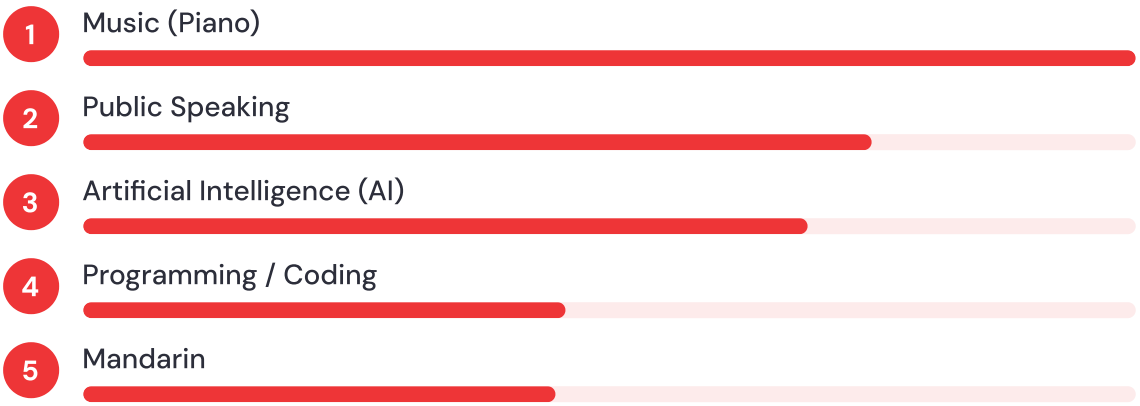
17 Edupoint internal analysis (indexed)

A New Wave: Music, Public Speaking, AI, and Coding

> Beyond core academic subjects, demand is rising for 21st-century skills — music, public speaking, artificial intelligence, and programming.

The demand map reveals interests that reach past the school report card. Piano leads the non-academic category, followed by public speaking as a communication skill increasingly sought from an early age.

Interest index for skills beyond core academics (top interest = 100)



Relative index, top category = 100. Absolute counts are not shown.

What stands out is the entry of artificial intelligence and programming into families' request lists. Mandarin adds a global-language dimension. Together, these signals mark a shift in how Indonesian families view the skills their children will need — from exam scores toward skills used in work and life.

A SIGNAL OF THE FUTURE

Family demand for AI and coding signals early awareness of digital skills. This is a growth space worth anticipating for tutoring providers.

Source: EduPoint internal analysis (indexed), private tutoring demand February–June 2026.

18 Indexed internal + external sources

Implications and Recommendations

> The report's findings point to steps for families, service providers, and education policymakers.

For families

1. Start guidance on cumulative subjects (Mathematics, Science) early, before gaps pile up.
2. Align test preparation with the national selection calendar — the first half of the year is its peak season.
3. Consider online classes to reach quality tutors beyond the nearest city.

For service providers

1. Strengthen tutor supply beyond Java's corridor through online classes and regional campus outreach.
2. Anticipate the new wave of interest (AI, coding, public speaking) with suitable curricula and tutors.
3. Maintain pedagogical quality, drawing on the base of teacher-training graduates.

For policymakers

1. Equalizing rural digital infrastructure would directly widen access to online learning.
2. The supply gap between regions signals a need for incentives to distribute teaching talent.
3. The rising household education burden underscores the importance of education-cost support.

19 Indexed internal + external sources

Outlook: Toward 2026 and Beyond

> In-person remains the backbone, online widens, and digital skills mature into the mainstream — while awaiting a longer data range.

Three directions appear to strengthen. First, in-person learning will remain the backbone, while the online share widens as digital infrastructure matures. Second, test preparation will stay a seasonal driver as large-scale national selection continues. Third, digital skills — AI, coding — move from a fringe interest toward the mainstream of demand.

This report is a single-period snapshot, so its projections are indicative rather than firm forecasts. Future editions will broaden the time range so full seasonality and year-over-year change become readable — the foundation for a richer recurring education index.

> *Measuring how a nation learns is the first step to improving it.*
>
> — EduPoint Research Team

Methodology & Limitations

This report combines two data lanes. The internal lane comes from the EduPoint platform and is presented in indexed form (index, rank, or share), with no absolute figures. The external lane comes from official sources and is cited directly. This separation preserves confidentiality alongside credibility.

Data window

Internal demand data covers February–June 2026. Because this span is short, the report is framed as a current-state snapshot rather than a year-over-year trend analysis.

Seasonal claims rely on the national education calendar from official sources.

Definitions

Tutor supply is counted from registered prospective tutors who list a domicile. Demand is counted from incoming subject requests. Indonesian and English labels for the same subject are merged into one cluster.

Masking & confidentiality

All internal magnitudes are converted to indices, ranks, or relative shares. No absolute counts, rupiah rates, or business metrics are shown. The aim is to present market structure and direction without exposing operational data.

Alignment

The provincial supply index is aligned with the national student distribution (PDDikti/BPS) so that it reflects the true market structure rather than sampling distortion.

Representativeness

Data cells with small samples are hidden to preserve representativeness and privacy. The reading focuses on provinces and categories with sufficient data support.

Limitations

As a single-period snapshot, this report does not yet capture full seasonality or year-over-year change. Future editions will broaden the time range so long-term trends become readable.

References

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[13] Open Unemployment by Highest Education Attained, Statistics Indonesia (BPS) (2024)

[14] Permendikbudristek No. 12/2024 on the Curriculum for Early Childhood, Primary, and Secondary Education, Ministry of Education, Culture, Research, and Technology (2024)

APPENDICES A

Indexed Data Tables

A summary of all indices used in this report. Every value is relative (indexed) and does not represent absolute counts.

A.1 Tutor supply index by province (base = 100)

Province	Index
West Java	100
East Java	86
Central Java	68
Jakarta (DKI)	64
Yogyakarta (DIY)	52

Aligned with the national student distribution (PDDikti/BPS).

A.2 Demand index by subject cluster (Mathematics = 100)

Cluster	Index
Mathematics	100
Science	77
English	75
Test Prep	32
Quran Reading	21
Public Speaking	13

ID/EN labels merged; absolute counts not shown.

A.3 Share of learning modes

Mode	Share
In-person	≈75%
Online	≈19%
Shared venue	≈6%

Internal demand composition, Feb–Jun 2026.

APPENDICES B

Glossary

- Indexed value: a figure relative to a given base (e.g. highest = 100), not an absolute count.
- Formal/non-formal/informal education: the three education pathways under Law No. 20/2003.
- LPTK: teacher-training institutions — campuses that prepare educators.
- SNBT/UTBK: National Selection Based on Test via the Computer-Based Written Exam.
- Susenas MSBP: National Socio-Economic Survey, Social-Cultural and Education Module (BPS).