

Tutoring Demand Map by Education Level 2026

The relative spread of private tutoring demand across primary, junior high, senior high, university, and early childhood, together with its seasonal rhythm.

EduPoint Research Team • Data window: 2026-02/2026-06 • Indonesia •
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ABSTRACT

Indonesian private tutoring demand in 2026 peaks at the secondary levels: senior high leads the index, followed by junior high and primary, while university and early childhood form strengthening clusters. Demand pulses with the national selection calendar and the change of academic year. This report maps that spread as a relative index, grounded in indexed data and official statistics.

Executive Summary

Tutoring demand is usually read through the subjects families seek. This report takes a different angle: it maps demand by the student's education level, from early childhood to university. This lens reveals where an Indonesian family's learning journey most needs support, and when that need peaks across the year.

The map by level shows the centre of gravity resting on the secondary tiers. Senior high leads the demand index, anchored by the funnel of university entrance selection, followed closely by junior high as a transition point and

primary as the numeracy foundation. At the other end of the spectrum, university students form their own demand cluster for quantitative coursework and study support, while early childhood grows as a young, strengthening segment.

Demand is not flat across the year. It pulses with the national education calendar: peaking ahead of the Computer-Based Written Test in the second quarter, then strengthening again at the change of academic year. This seasonal rhythm is consistent with national selection at a scale that draws hundreds of thousands of applicants each year.

All internal figures are presented as a relative index to preserve confidentiality, while factual claims rest on official sources such as Statistics Indonesia, SNPMB, and the OECD. This report is a snapshot of one period; the next edition will extend the time window so that full seasonality and year-over-year change can be read in whole.

Key Findings

- 1 Senior high (SMA/SMK) tops private tutoring demand with an index of 100, followed by junior high (88) and primary (76); the secondary levels absorb the thickest demand.
- 2 Demand from university students forms a distinct cluster at roughly a third of the peak, a segment often missing from the tutoring map.
- 3 Early childhood appears as a small yet strengthening cluster at about a fifth of the peak, as awareness of school readiness grows.
- 4 Demand pulses seasonally: the highest wave arrives ahead of the UTBK-SNBT selection in March and April, and again at the change of academic year in June and July.
- 5 The student pyramid narrows upward, from a primary Net Enrolment Ratio of 97.89

percent toward lower secondary figures; tutoring demand runs strongest at the transition points between levels.

Introduction: Reading Demand by Education Level

Mapping private tutoring demand by education level reveals where a family's learning journey most needs support.

Indonesia's education system is built in tiers. Law Number 20 of 2003 on the National Education System arranges the formal pathway from early childhood, primary school, junior high, and senior high through to higher education. Each level carries its own material demands, exam rhythm, and stakes. Private tutoring demand follows this tiered structure in kind.

THE FORMAL EDUCATION LEVELS

Early childhood (PAUD): the path toward school readiness. Primary (SD): six years building literacy and early numeracy. Junior high (SMP): three transition years with a leap in material. Senior high (SMA/SMK): three years of specialisation toward selection. Higher education: the advanced study tier. Private tutoring supports each level with distinct needs.

Reading demand through levels complements reading it through subjects. The subject map answers what is being studied; the level map answers who is studying and at what phase. The two meet on one practical question: where does a family most need support, and when is that need most pressing?

This report maps Indonesian private tutoring demand in early 2026 by the student's level. It presents a relative index across levels, traces the needs distinctive to each phase, and reads the seasonal rhythm that accompanies them. The aim is an honest reference for how learning demand spreads along a child's educational journey.

Scope and reading

The report covers private tutoring demand across Indonesia, grouped by the student's level. Internal figures are indexed, presented as the structure and

direction of demand, without absolute counts. External facts are cited from official sources and clearly marked, so credibility rests on data that can be traced.

The Indonesian Student Pyramid

Indonesia's student population narrows from primary to secondary, and each narrowing marks a transition point where support demand strengthens.

The spread of tutoring demand rests on the spread of students themselves. In the 2024/2025 school year, Statistics Indonesia recorded roughly 52.9 million students taught by about 3.38 million teachers in the formal system. This population forms a pyramid: widest at the primary level, then narrowing toward the secondary tiers.

Net Enrolment Ratio (NER) by level, 2024 (BPS)

Level	NER 2024
Primary (SD)	97.89%
Junior High (SMP)	around 82%
Senior High (SMA/SMK)	around 63%

Source: BPS, Net Enrolment Ratio by Province and Education Level 2024. The primary NER is cited exactly; junior and senior high figures are rounded to the ranges published by BPS.

This narrowing pyramid carries a double meaning for tutoring demand. At the primary level, the number of students is large, so the volume of need is thick even though the stakes are not yet as high as in the upper tiers. At the secondary levels, the population shrinks, yet the stakes rise because each transition demands heavier adaptation of material and tighter entrance competition.

TRANSITION AS A DEMAND NODE

Each narrowing of the pyramid marks a transition: into junior high, into senior high, then into university selection. It is at these nodes that families

most often seek support, because the leap in material and the stakes of selection feel the greatest.

Early childhood education sits at the base of the pyramid with participation still far below the primary level. Its room to grow is wide, and demand for school-readiness support is beginning to strengthen, a dynamic examined in its own chapter.

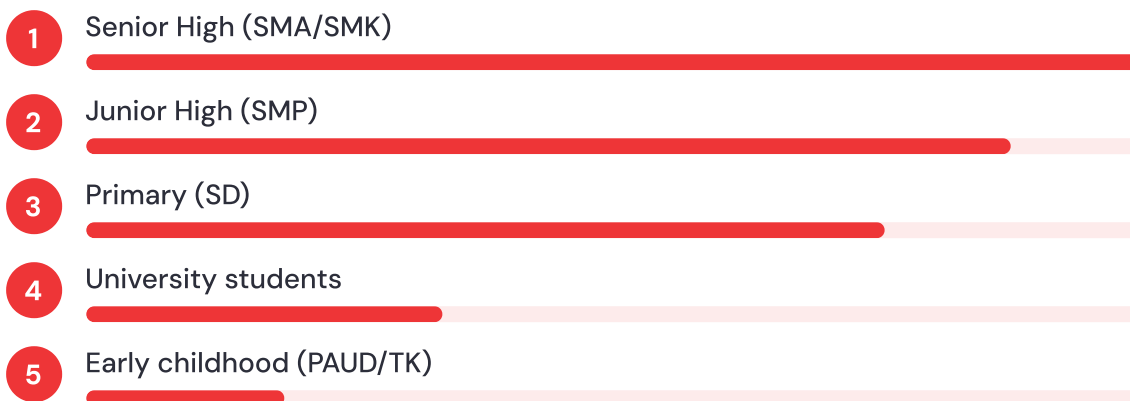
Source: BPS, Education Statistics 2024; BPS, Net Enrolment Ratio by Province and Education Level 2024.

The Demand Map by Level

Private tutoring demand peaks at senior high, followed closely by junior high and primary, while university and early childhood form smaller yet real clusters.

When private tutoring demand is grouped by the student's level, its centre of gravity rests on the secondary tiers. Senior high holds the highest demand index, anchored by the funnel of university entrance selection that calls for intensive preparation. Junior high follows closely as a transition point, and primary completes the top three as a large-population numeracy foundation.

Private tutoring demand index by student level (SMA = 100)



Relative demand index across levels, highest level = 100. Absolute figures are not shown; levels with small samples are not split out to preserve representativeness.

Beyond the three school tiers, two clusters grow at the ends of the spectrum. Demand from university students reaches about a third of the peak, a segment that rarely surfaces in conversations about private tutoring. Early childhood sits at around a fifth of the peak, a young cluster strengthening as parents grow aware of school readiness.

WHY THE SECONDARY LEVELS LEAD

Senior high and junior high combine two pressures at once: increasingly challenging material and an ever-nearer selection to the next level. This combination makes families quickest to seek support during the secondary phase, placing it at the core of tutoring demand by level.

This index shows the order of need across levels without revealing raw volume. Each level is examined more deeply in the chapters that follow, from school readiness in early childhood to study support at university.

Source: Internal EduPoint analysis (indexed), private tutoring demand February to June 2026.

Early Childhood: School Readiness on the Rise

Demand for early-years support remains small in the index, yet it grows with parental awareness of school readiness and the wide room for early childhood participation.

At the base of the pyramid stands early childhood education. In the demand index, this level holds the smallest share, around a fifth of the peak, in line with the youngest student age. The needs here revolve around school readiness: recognising letters and numbers, fine motor skills, and early learning habits.

This level has wide room to grow. National early childhood participation remains far below the primary level according to Statistics Indonesia, so many families are only beginning to consider early-years support. The awareness that learning foundations form early prompts some parents to seek support sooner than the generation before them.

THE EARLY FOUNDATION

In the demand index by level, early childhood sits at around 19 on a base of 100. Its share is small, its growth direction upward as attention to school readiness increases.

— Internal EduPoint analysis (indexed)

The national curriculum provides a frame. Regulation of the Minister of Education, Culture, Research, and Technology Number 12 of 2024 places early childhood within the Merdeka Curriculum, which emphasises meaningful learning suited to a child's developmental stage. Good early-years support moves in step with this spirit, honouring the pace of learning through play.

Source: BPS, Education Statistics 2024; Regulation No. 12 of 2024; internal EduPoint analysis (indexed).

Primary: The Foundation of Numeracy and Literacy

The primary level absorbs thick demand because its population is large and because early numeracy is cumulative, where small gaps quickly compound.

Primary school holds a top-three place in the demand index with a share of around three-quarters of the peak. Two things sustain it: the largest student population in the pyramid, and the nature of foundational material that underpins every level above it. Reading, writing, and arithmetic form the toolkit that shapes years of smooth learning ahead.

Early numeracy is cumulative. A single missed concept, such as fraction operations or basic multiplication, obstructs the concept above it. This tiered nature makes families quick to seek support the moment a child stalls, so that the gap does not compound heading into the secondary years.

PATCHING EARLY

A numeracy gap at the primary level is cheaper to patch than one left until junior high. Early support keeps the foundation firm, so the transition to the next level feels lighter.

The national context sharpens this urgency. The Programme for International Student Assessment 2022 recorded about 18 percent of Indonesian students reaching the minimum level of numeracy proficiency, with a mathematics score of 366 against the OECD average of 472. This figure shows how important it is to protect the numeracy foundation from the primary level, before the gap widens.

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

Junior High: The Transition Point and the Leap in Material

Junior high holds second place in the demand index because it marks a leap in material and a gateway to a chosen senior high.

Junior high holds second place in the demand index, just below senior high. This level is the first transition that feels heavy: material leaps from concrete to abstract, subjects multiply, and the exam rhythm hardens. Algebra, geometry, and more formal science demand a new way of thinking.

This transition explains the thickness of demand. The Net Enrolment Ratio falling from primary to junior high signals that not every student clears the transition smoothly. Families who recognise this leap seek support so that a child keeps pace, especially in tiered subjects such as mathematics and science.

PREPARING THE SENIOR-HIGH GATEWAY

Junior high is more than an in-between level. It shapes readiness for a chosen senior high and forms study habits that carry through to university selection. Demand for support here rests on that long-term stake.

Tutoring demand at this level covers reinforcement of daily material alongside preparation for final exams and entrance to favoured senior high schools. The combination of both makes junior high one of the most consistent demand nodes across the year.

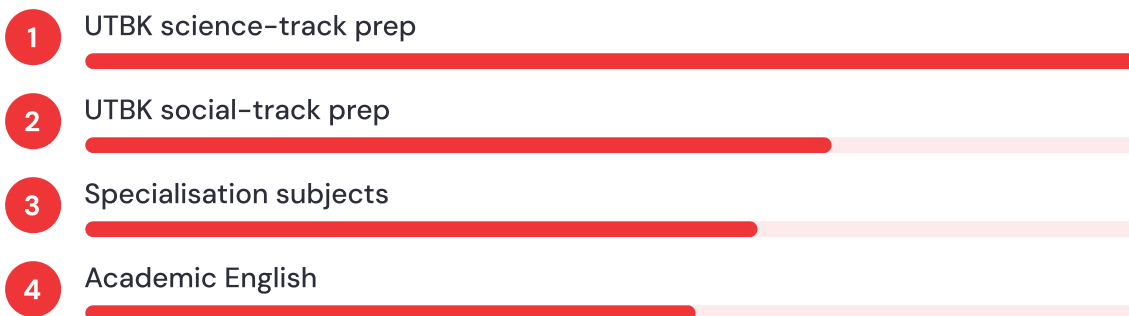
Source: BPS, Net Enrolment Ratio 2024; internal EduPoint analysis (indexed).

Senior High: The Selection Funnel and Specialisation

Senior high tops the demand index because it is the funnel of university entrance preparation, with the science track leading specialisation.

Senior high sits at the top of the demand index by level. The reason is clear: this level is the funnel of university entrance preparation, the moment with the highest stakes in the school journey. Demand peaks as the Computer-Based Written Test and the achievement-based selection draw near.

Demand focus index within senior high (highest focus = 100)



Relative index within the senior high level, highest focus = 100. Absolute figures are not shown.

Within senior high, demand focus leans toward selection preparation. The science track leads, sustained by the weight of quantitative subjects in the selection for science, engineering, and health programmes. The social track follows, then reinforcement of daily specialisation subjects and academic English for advanced study.

A PEAK WITH A DEADLINE

Unlike other levels, senior high demand carries a firm deadline: the selection exam date. It is this deadline that lifts senior high to the top of the index while also making its demand the most seasonal.

A focus on selection does not erase daily needs. Reinforcement of specialisation subjects and academic English runs throughout the year, forming the base on which selection preparation is built as the exam season approaches.

Source: Internal EduPoint analysis (indexed); SNPMB, UTBK-SNBT 2025 data.

University Students: The Often-Overlooked Demand Cluster

Demand from university students forms a real cluster for quantitative coursework, data analysis, language, and thesis support.

At the upper end of the level spectrum, university students form a demand cluster often overlooked in the private tutoring map. Its index reaches about a third of the peak, large enough to count. Its needs differ from the school levels. The focus shifts from report-card marks toward completing challenging coursework and preparing the next academic step.

Composition of tutoring demand among university students



- Quantitative coursework ≈42%
- Data analysis & statistics ≈24%
- Language & advanced-study prep ≈20%
- Final-project support ≈14%

Relative share across needs within the university cluster (percent). Based on internal demand composition February to June 2026.

Quantitative coursework leads this cluster: calculus, statistics, and accounting are recurring needs across programmes. Data analysis and statistical methods follow, in line with the demands of research and quantitative assignments. Language and advanced-study preparation round it out, from reinforcing academic English to preparing for postgraduate selection.

AN UNDERRATED SEGMENT

University demand shows that private tutoring serves a long learning journey that reaches beyond the school bench. This cluster opens room to

serve advanced academic needs that have been under-mapped.

Final-project support holds the smallest yet meaningful share, taking the form of methodology and writing guidance that honours the student's own academic work. Together, these four needs make the university cluster a mature segment worth serving with suitably qualified tutors.

Source: Internal EduPoint analysis (indexed), private tutoring demand February to June 2026.

Seasonal Rhythm: The UTBK and Grade-Transition Waves

Tutoring demand pulses with the education calendar, peaking ahead of UTBK-SNBT in the second quarter and strengthening again at the change of academic year.

Tutoring demand is not flat across the year. It pulses with the national education calendar, with two clearest waves: the university selection season in the second quarter, and the change of academic year at mid-year.

Seasonal rhythm index of tutoring demand across the year (annual average = 100)



Index relative to the annual average (100), illustrative and aligned with the national education calendar. Absolute figures are not shown.

The first peak arrives in March and April, as the Computer-Based Written Test draws near. This selection is large and consistent in scale: in 2025, SNPMB recorded 860,976 UTBK-SNBT applicants with 253,421 admitted, a selectivity of about 29 percent. Pressure at this scale lifts test-preparation demand at the senior high level to its annual high point.

National selection scale in 2025 as a season marker (SNPMB)

Pathway	Applicants	Admitted
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Pathway	Applicants	Admitted
SNBT (UTBK)	860,976	253,421
SNBP (achievement)	776,515	173,028

Source: SNPMB, UTBK-SNBT 2025 data and SNBP 2025 results. SNBP applicants rose 10.6% from the year before.

The second wave appears in June and July as the academic year turns over. Grade transitions and entry into new levels prompt families to reorganise support: patching material left behind last semester, and preparing the leap to the next level. Demand strengthens across all levels, from primary to senior high.

READING THE ANNUAL RHYTHM

Two waves, one calendar. The selection season lifts senior high demand, while the change of academic year lifts demand across levels. Understanding this rhythm helps families plan and helps providers arrive on time.

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

Calibration to Official Statistics

The demand index by level is aligned with student distribution and national learning outcomes so that it reflects the true market structure beyond any sample distortion.

So that the demand map reflects the national structure, the internal index is read alongside official statistics. The distribution of students according to Statistics Indonesia serves as a backdrop: the largest population at the primary level, narrowing toward secondary. The demand index is calibrated against this backdrop so the direction of reading stays valid.

National learning outcomes further explain why certain levels absorb thicker demand. PISA 2022 placed Indonesia's scores below the OECD average in reading (359 against 476), mathematics (366 against 472), and science (383 against 485). This gap is felt most at the secondary levels, where material grows more abstract and selection draws closer.

THE CALIBRATION PRINCIPLE

The internal index shows the shape and order of demand; official statistics show population structure and outcomes. Uniting the two produces a map that reflects the national market in full, beyond a single platform's snapshot.

Family aspiration forms the next explanatory layer. BPS recorded a Mean Years of Schooling of 8.85 years among adults in 2024, while the Expected Years of Schooling for children reached 13.21 years. This gap maps the cross-generational ambition to reach a higher level, and tutoring demand flows along that ambition, peaking at the level that serves as the gateway to advanced study.

Source: OECD, PISA 2022 Results (Indonesia); BPS, Education Statistics 2024 and Human Development Index 2024; internal EduPoint analysis (indexed).

Education Cost by Level and Equity

Household education spending climbs sharply with each level, forming the economic backdrop against which support decisions are made.

The decision to seek tutoring always rests on a family's economic backdrop. Data from Statistics Indonesia's 2024 National Socioeconomic Survey shows household education spending climbing sharply with each level, from primary school to higher education.

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

Level	Average per year
Primary (SD)	± Rp4.6 million
Junior High (SMP)	± Rp7.3 million
Senior High (SMA)	± Rp10.2 million
Higher Education	± Rp19.0 million

Source: BPS, Education Support Statistics 2024 (Susenas MSBP). The largest components at the school levels include allowance, transport, and tuition.

This rising burden moves in step with the rising stakes of each level. The closer the selection gateway, the greater a family's willingness to add to its learning investment. This pattern explains why support demand thickens at the secondary levels, where cost and stakes both climb.

A QUESTION OF EQUITY ACROSS LEVELS

The climbing cost burden raises a question of fairness. Online classes can shorten the distance to quality tutors, as long as digital infrastructure reaches them, especially for families at a level where the stakes are high but resources are limited.

The room for online learning to grow rests on digital readiness. The APJII 2024 survey recorded national internet penetration at 79.5 percent, equal to 221.5 million people. This access opens the chance to level support across tiers and regions, while the gap between city and village remains a shared task.

Source: BPS, Education Support Statistics 2024 (Susenas MSBP); APJII, Indonesia Internet Penetration Survey 2024; internal EduPoint analysis (indexed).

Implications and Recommendations

The demand map by level guides steps for families, service providers, and education policymakers.

For families

1. Begin numeracy support at the primary level before the gap compounds heading into junior high.
2. Anticipate transition points (into junior high, into senior high) as phases that demand heavier adaptation of material.
3. Align selection preparation at senior high with the UTBK–SNBT calendar, since demand and pressure peak in the second quarter.

For service providers

1. Strengthen tutor capacity at the secondary levels, where demand is thickest and most seasonal.
2. Develop services for the often-overlooked university cluster, with tutors from the right fields of study.
3. Anticipate seasonal surges ahead of selection and the change of academic year with flexible tutor scheduling.

For policymakers

1. The fall in participation from primary to secondary marks transition points worth reinforcing with support.
2. Levelling digital infrastructure will widen access to support across levels, especially at high-stakes tiers.

3. The climbing household education burden by level underscores the importance of cost support and scholarships.

13

Indexed internal + external sources

Outlook: The Direction of Demand by Level

The secondary levels will remain the centre of demand, the university and early childhood clusters will widen, while a longer data window awaits.

Three directions appear to strengthen. First, the secondary levels will remain the centre of demand as long as large-scale national selection keeps the stakes high. Second, the university cluster stands to widen as awareness of advanced academic support grows. Third, early childhood grows slowly as attention to early school readiness increases.

The seasonal rhythm will remain a hallmark of tutoring demand. As long as the selection and academic-year calendar shapes the pulse of national education, the two annual waves will recur. Providers who read this rhythm can arrive more punctually at each level.

This report is a snapshot of one period, so its projections are indicative. The next edition will extend the time window so that full seasonality and year-over-year change can be read in whole, building a periodic demand index by level.

Knowing at which level a child most needs support is half the way toward the right decision.

— 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, ranking, or share), without 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 the February to June 2026 period. Because this window is short, the report is composed as a snapshot of the current state. The seasonal rhythm is presented as an illustrative index aligned with the national education calendar, without claiming a full year of internal observation.

Level definitions

Demand is grouped by the student's level: early childhood, primary, junior high, senior high, and university. Demand that does not clearly state a level is not forced into a category, so the reading stays valid.

Masking & confidentiality

All internal quantities are converted into a relative index, ranking, or share. No absolute counts, rupiah rates, or business metrics are shown. The aim is to present the structure and direction of demand without revealing operational data.

Calibration

The demand index by level is read alongside student distribution and national learning outcomes (BPS, OECD) so that it reflects the real market structure in full, beyond a single platform's sample distortion.

Representativeness

Data cells with small samples are not split out to preserve representativeness and privacy. The reading focuses on levels and categories with adequate data support.

Limitations

As a snapshot of one period, this report does not yet capture full seasonality or year-over-year change. The seasonal index is illustrative and aligned with the official calendar. The next edition will enrich the time window so that long-term trends can be read.

References

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APPENDICES A

Indexed Data Tables

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

A.1 Demand index by level (SMA = 100)

Level	Index
Senior High (SMA/SMK)	100
Junior High (SMP)	88
Primary (SD)	76
University students	34
Early childhood (PAUD/TK)	19

Absolute figures are not shown; levels with small samples are not split out.

A.2 Demand focus index within senior high (highest focus = 100)

Focus	Index
UTBK science-track prep	100
UTBK social-track prep	71
Specialisation subjects	64
Academic English	58

Relative index within the senior high level.

A.3 Seasonal rhythm index (annual average = 100)

Period	Index
Jan–Feb	96

Period	Index
Mar–Apr	128
May–Jun	118
Jul–Aug	112
Sep–Oct	92
Nov–Dec	84

Illustrative, aligned with the national education calendar.

APPENDICES B

Glossary

- Indexed value: a value relative to a given base (e.g. highest = 100), not an absolute count.
- Education level: the formal tiers from early childhood, primary, junior high, senior high, to higher education under the National Education System Law 20/2003.
- NER: Net Enrolment Ratio, the proportion of children at the age appropriate to a level who attend school on time.
- SNBT/UTBK: National Selection by Test through the Computer-Based Written Test.
- SNBP: National Selection by Achievement, a university-entry pathway based on report cards and achievement.
- Susenas MSBP: National Socioeconomic Survey, Social Culture and Education Module (BPS).

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