RESEARCH REPORT · EDUPOINT EDUCATION RESEARCH | EDISI 2026

Early-Learning & Preschool Tutoring Trends 2026

An early-learning demand index, the shift toward younger start ages, and the face of school readiness among Indonesian children.

EduPoint Research Team • Data window: 2026-02/2026-06 • Indonesia • 26 min read • 24 pages

ABSTRACT

Demand for early-learning tutoring in 2026 centers on primary-school readiness and foundational literacy and numeracy, with the age at which families begin support shifting earlier into the pre-school years. Young children learn almost entirely in person. This report maps those trends through indexed data and official statistics.

Executive Summary

Early learning marks the first node in a child's education journey. Before primary school begins, Indonesian families weigh how to equip a child with letters, numbers, and the habits of learning. This report captures those trends in the first half of 2026 through two data lanes: indexed internal analysis and official statistics quoted directly from government bodies.

On the demand side, early-learning tutoring pivots on two aims that flow into one another: readiness for primary school and mastery of foundational reading, writing, and counting. Fluent reading, early numeracy, and language exposure

follow as their natural extensions. This map shows that families treat the pre-school years as the foundation that shapes how smoothly the next stage unfolds.

The starting age is moving earlier. Pre-school children under six now form a real share of early-learning demand. Their learning is almost entirely in person, because young children thrive on direct guidance, concrete materials, and a patient pace. Online classes hold only a small share at this age band.

All internal figures are presented as indices to protect confidentiality, while factual claims rest on official sources such as Statistics Indonesia and the Ministry of Education. The policy backdrop is shifting too, moving national focus from literacy-numeracy entrance tests toward six foundational abilities. This report is a snapshot of one period; future editions will widen the time range so longer-term trends read more fully.

Key Findings

1. Early-learning demand centers on primary-school readiness and foundational reading, writing, and counting, the two aims that top the early-learning demand index.
2. The age at which families begin support is shifting earlier: pre-school children under six make up a real share of early-learning demand.
3. Early childhood learning is almost entirely in person, with only a thin online share, matching the hands-on guidance young children need.
4. National preschool participation still hovers near a third of children aged 3–6 (gross enrollment around 36 percent), leaving wide room to grow.
5. National policy has shifted focus from literacy-numeracy entrance tests toward six foundational

abilities, reshaping what school readiness means for families and tutors.

01 External sources (cited)

Introduction: Early Learning at the Start of the Journey

> Early learning occupies the pre-school and early-grade years, the time when a child meets letters, numbers, and the habits of study that carry the stages to come.

A child's education journey begins long before the primary-school uniform is worn. Between the ages of three and six, a child meets letters and numbers, practices the fine motions of writing, and builds the curiosity that will accompany years of study. Law No. 20 of 2003 on the National Education System places this stage within the frame of Early Childhood Education (PAUD), whose aim is to support a child's physical and mental growth toward readiness for further schooling.

CALISTUNG AND PAUD

Calistung is the Indonesian shorthand for reading, writing, and counting: the basic skills that open the door to literacy and numeracy. PAUD is the education stage for children aged 0–6, spanning kindergarten, play groups, and childcare centers, which build a foundation for learning before primary school.

In the world of learning support, the early stage wears its own face. Early-literacy and school-readiness tutoring accompany a child in recognizing letter shapes, counting objects, and settling into focused attention. Its form is gentle and playful, resting on patience, because young children learn through concrete experience and joyful repetition.

This report maps early-learning and preschool tutoring trends in early 2026: how large early-learning demand is, at what age families begin support, which materials are most sought, how children learn, and who their tutors are. The aim is to build an honest data reference for the earliest segment of education, the one that most shapes a child's later direction of study.

Scope and how to read it

The report covers early-learning demand across Indonesia, focused on the pre-school and early primary grades. Policy context and national preschool participation appear as background. Every internal figure is presented as an index, describing the structure and direction of demand without revealing absolute counts, while external facts are quoted from official sources and clearly marked.

02 External sources (cited)

Policy Context: From Literacy Tests to Foundational Abilities

> National policy has ended reading-writing-counting tests as a primary-school entry requirement and steered early learning toward six holistic foundational abilities.

The meaning of school readiness is being reshaped by national policy. In 2023, the Ministry of Education, Culture, Research, and Technology launched Merdeka Belajar Episode 24, titled A Joyful Transition from PAUD to Primary School. The policy affirms that primary-school admissions may not require reading, writing, and counting tests.

SIX FOUNDATIONAL ABILITIES

Merdeka Belajar Episode 24 directs early learning toward six foundational abilities: recognizing religious values and good character; social and language skills for interaction; emotional maturity; sufficient cognitive maturity; motor skills and self-care; and a positive view of learning. Literacy and numeracy grow within this frame, and a standalone entrance test falls away.

The ban on entrance testing has deep roots. Government Regulation No. 17 of 2010 on the Management and Administration of Education, in Article 69 paragraph (5), already states that admission to grade one of primary school must not rest on the results of reading, writing, and counting tests. The 2023 policy reaffirmed a rule that had often been overlooked in practice.

This shift changes how families understand school preparation. The focus moves from merely chasing early reading fluency toward a fuller readiness: a child who is comfortable socializing, able to manage emotions, and who sees learning as a joyful experience. Good early-learning tutoring adapts to this direction, weaving letters and numbers into play and meaningful activity.

HOLISTIC READINESS

National policy places literacy and numeracy within a whole-child readiness. Early support aligned with this direction grows a child's interest in reading and counting without burdening them with test pressure.

Source: Ministry of Education (Kemendikbudristek), Merdeka Belajar Episode 24 (2023); Government Regulation No. 17 of 2010, Article 69 paragraph (5).

03 External sources (cited)

National Preschool Participation: Wide Room to Grow

> Only about a third of children aged 3–6 attend PAUD by gross enrollment, a wide gap that sustains demand for early-learning support.

Access to early childhood education still leaves a large task undone. Statistics Indonesia (BPS) recorded a Gross Enrollment Rate (APK) for PAUD among children aged 3–6 of around 36 percent in 2024, meaning only about a third of children in that age band attend formal or non-formal PAUD services.

> PRESCHOOL PARTICIPATION 2024
>
> **The PAUD gross enrollment rate for children aged 3–6 stood near 36 percent in 2024. Roughly two-thirds of children in this band remain untouched by formal PAUD services.**
>
> — BPS, PAUD Gross Enrollment Rate 2024

National education data even record a dynamic worth watching. The number of PAUD learners fell by about 203,000 children in 2024, alongside a decline in PAUD teachers, even as the number of institutions grew. This signals challenges in equity and continuity of service, and confirms that the need for early-learning support is not yet fully met by the formal pathway.

A picture of PAUD participation and policy direction (BPS & Ministry of Education)

Indicator	Value / direction
PAUD gross enrollment, ages 3–6 (2024)	± 36%
Change in PAUD learners (2024)	down ± 203 thousand children
Target children entering PAUD (2029)	± 9.6 million children

Source: BPS, PAUD Gross Enrollment Rate 2024; Ministry of Education, direction of PAUD revitalization toward 2029. External values are quoted directly as context.

The government treats strengthening PAUD as a strategic agenda, aiming to widen the reach of children entering PAUD by the end of the decade. This wide room to grow is what sustains early-learning demand in the support pathway: when formal services have yet to reach every child, families seek other ways to equip their little ones from the very start.

Source: BPS, PAUD Gross Enrollment Rate 2024; BPS, The Face of Indonesian Education (2024); Ministry of Education, PAUD Statistics 2024/2025; EduPoint internal analysis (indexed).

04 External sources (cited)

Foundational Curriculum and School Readiness

> The national curriculum for the early stage stresses foundational abilities and learning readiness, framing early-learning tutoring as a joyful companion.

Good early-learning tutoring rests on the curriculum that governs the early stage. Regulation of the Minister of Education No. 12 of 2024 establishes Kurikulum Merdeka as the national curriculum for PAUD, primary, and secondary education. For young children, it stresses learning outcomes centered on religious and moral values, self-identity, and the foundations of literacy, mathematics, science, technology, arts, and engineering.

FOUNDATION, NOT EARLY PRESSURE

The early-stage curriculum places letters and numbers within play and meaning. Literacy and numeracy grow as foundations, woven into activities suited to a child's developmental stage and kept clear of rote drills that overburden.

This emphasis on foundational abilities aligns the aims of school, family, and tutor. When the curriculum steers toward gradually built literacy and numeracy, early-learning tutoring finds its role as a bridge: translating curriculum outcomes into each child's pace and learning style, with patient repetition and play that ties symbols to meaning.

School readiness is now understood more broadly than reading fluency. A ready child is one who knows themselves, can interact with others, and sees learning as a joyful activity. School-readiness tutoring that aligns with the curriculum places literacy and numeracy skills within this whole-child readiness.

A COMPANION TO THE CURRICULUM

> A curriculum that stresses foundations gives early-learning tutoring a clear role: nurturing a child's interest in reading and counting while keeping the learning experience joyful and developmentally appropriate.

Source: Regulation of the Minister of Education No. 12 of 2024 on the PAUD, Primary, and Secondary Curriculum; EduPoint internal analysis (indexed).

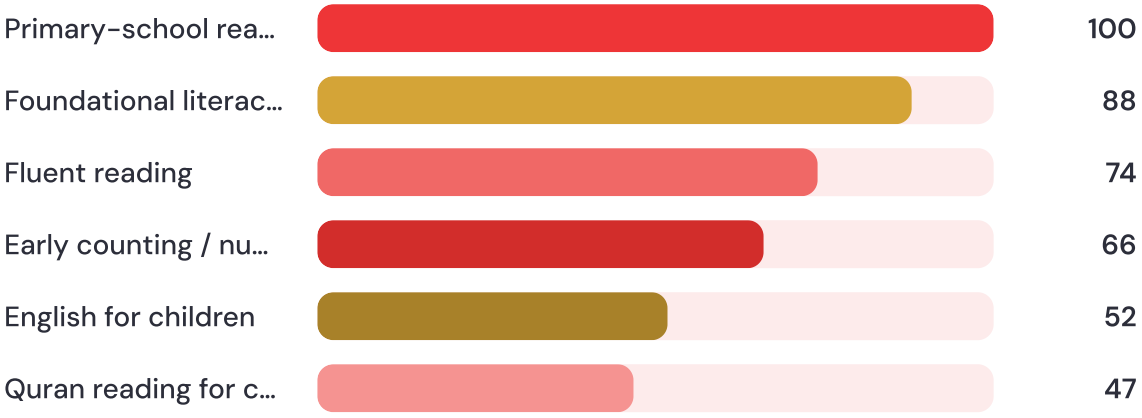
05 Edupoint internal analysis (indexed)

The Early-Learning Demand Index: School Readiness Leads

> Early-learning demand centers on primary-school readiness and foundational literacy and numeracy, with early reading and counting following close behind.

Early-learning demand has a clear center of gravity. Readiness for primary school holds the highest demand index, reflecting family concern as a child approaches the transition to formal grades. Foundational reading, writing, and counting follow close behind, felt as the skill set that most directly shapes a smooth start to school.

Early-learning tutoring demand index by learning aim (highest = 100)



Relative demand index, top aim = 100. Absolute figures are not shown; small-sample categories are suppressed for representativeness.

Fluent reading and early counting follow as extensions that flow into one another. Both are the skills most visible to parents: a child who can already read and count is seen as more confident entering the early grades. English for children and Quran reading round out the range, signaling that families equip a child with more than one kind of foundation.

> WHY SCHOOL READINESS PEAKS

> The move to primary school is the first great leap in a child's life. Parental anxiety at this moment lifts demand for school-readiness tutoring, within which literacy and numeracy are the most-requested component.

Demand is shown as a relative index across learning aims, revealing the order of needs without exposing raw volume. Each aim is examined further in the chapters that follow, from the starting age of learning to the range of materials that accompany it.

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

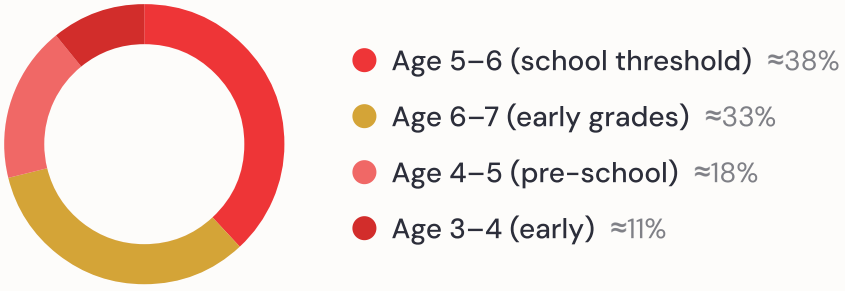
06 Edupoint internal analysis (indexed)

The Shifting Start Age: Pre-School Children More Involved

> The age at which families begin tutoring is moving earlier, with pre-school children under six holding a real share of early-learning demand.

When does a child first receive learning support? The map of early-learning demand reveals a shift toward younger ages. The five-to-six age group, right at the threshold of primary school, holds the largest share of demand, followed by children who have just entered the early grades.

Share of early-learning tutoring demand by child age group



Relative share across age groups (percent). Based on internal demand composition February–June 2026; absolute figures are not shown.

What stands out is the pre-school share. Children aged four to five, and even three to four, together hold nearly a third of early-learning demand. This signals that families begin support well before primary school, viewing the earliest years as a golden window for forming learning habits.

THE PRE-SCHOOL SHARE

Children under six hold nearly a third of early-learning demand, marking a shift of the tutoring start age into the pre-school years.

> — EduPoint internal analysis (indexed)

This shift deserves a careful reading. Healthy early learning keeps a child's rhythm of play and rest intact; support at very young ages prioritizes joyful discovery over demanding drills. The data reflects growing family interest, and it is a reminder of how important a developmentally appropriate approach remains.

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

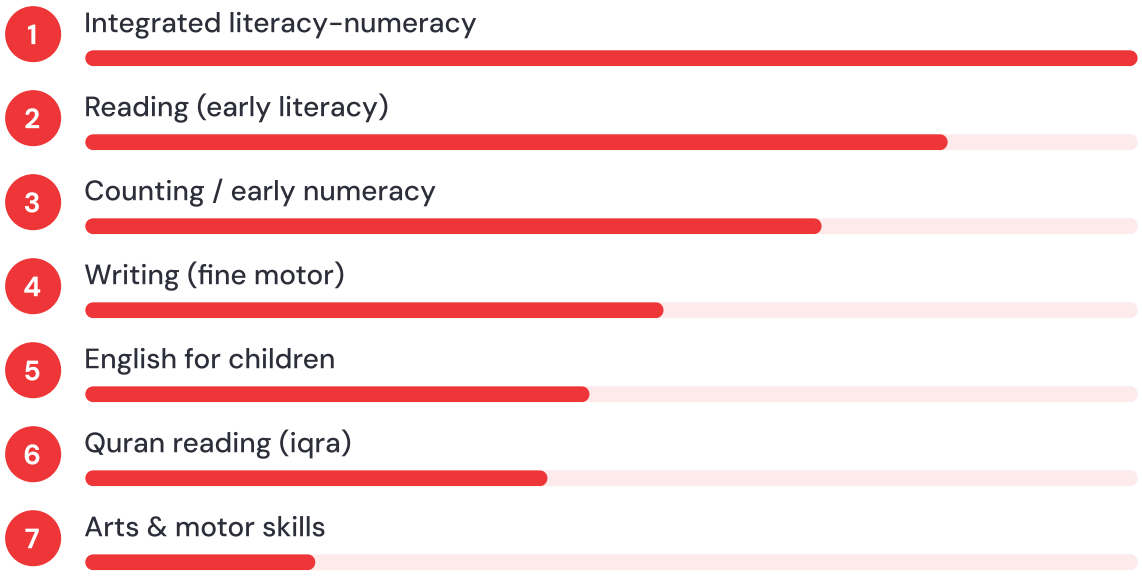
07 Edupoint internal analysis (indexed)

The Range of Early-Learning Materials: Read, Write, Count, and More

> Integrated literacy-numeracy leads the range of early-learning materials, with early reading and numeracy holding the next highest demand.

Within early-learning tutoring, the most sought materials follow the natural arc of mastering literacy and numeracy. An integrated reading-writing-counting package, weaving the three into one course of support, holds the highest demand. Families favor this integrated approach because the three skills reinforce one another.

Early-learning material demand index (top material = 100)



Relative index across materials, top = 100. Kindred labels are merged; absolute figures are not shown.

Early reading holds the next highest position, followed by counting and writing. The order makes sense: reading opens the door to every subject, counting builds early logic, and writing trains the fine motor control that supports both. English for children and Quran reading appear as added foundations many families choose from the start.

WHY INTEGRATED LITERACY-NUMERACY LEADS

Reading, writing, and counting grow most firmly when taught in connection. A child who meets a letter while writing it, and counts while naming, absorbs the three as one unified skill.

The range of materials is shown as a relative index, revealing the composition of needs without exposing raw volume. This variety underscores that early learning serves more than one aim: preparing literacy, growing numeracy, and building joyful habits of study.

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

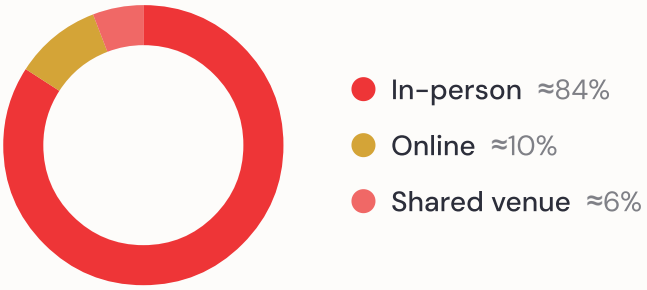
08 Indexed internal + external sources

How Children Learn: In-Person Dominates

> Early childhood learning is almost entirely in person, matching the direct guidance and concrete touch young children need.

The way young children learn leans strongly toward direct meetings. Most demand chooses the in-person format, because a child at this age learns through concrete touch, movement, and immediate responses from a companion seated by their side.

Share of learning modes in early-learning tutoring



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

The in-person share in early learning runs thicker than at higher stages. A young child needs a companion who can hold the pencil alongside them, arrange number blocks, and read their facial expression to adjust the pace. Online classes hold a small share, usually as support for families far from a quality tutor.

> **THE CONCRETE TOUCH THAT MATTERS**
> The younger the child, the more the physical presence of a companion matters. Play-based, object-rich early learning works best in person, with online as a support in areas far from tutors.

Room for online early learning does exist, supported by national internet penetration that has passed three-quarters of the population per the APJII 2024

survey. For young ages, however, the balance differs from higher stages: in-person is the backbone, and online complements it across geographic gaps.

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

09 Indexed internal + external sources

Foundational Readiness and the Pressure of Early Drilling

> Indonesia's still-lagging literacy and numeracy results underscore the value of a strong early foundation, while cautioning that early drilling should not become pressure.

Why does an early foundation matter so much? The answer shows in national learning outcomes at higher stages. The Programme for International Student Assessment (PISA) 2022 placed Indonesia's reading, mathematics, and science scores well below the OECD average, with most students yet to reach minimum competency in literacy and numeracy.

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 gap in literacy and numeracy reaches far back, into the earliest years. A child who builds firm reading and counting foundations from the start carries a stronger footing into the stages ahead. This is where early-learning and school-readiness tutoring find their deepest meaning: closing a foundational gap before it widens.

> A STRONG FOUNDATION, WITHOUT PRESSURE

> A firm literacy and numeracy foundation from early on supports years of learning to come. The key is to grow interest, protect a child's rhythm of play, and keep early literacy free of pressure unsuited to their age.

Balance is the watchword. National policy steering toward holistic foundational abilities and learning outcomes that still need strengthening meet at one point: Indonesian children need a strong early foundation, grown in a joyful and developmentally appropriate way.

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

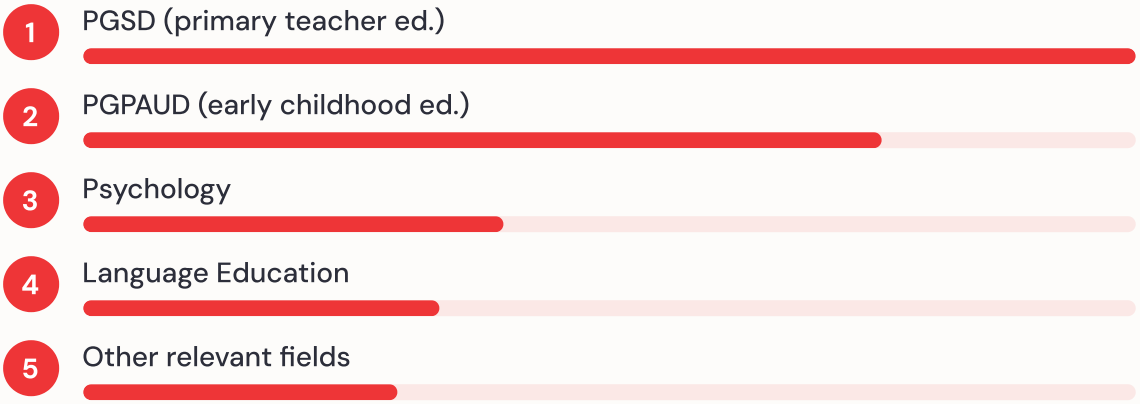
10 Indexed internal + external sources

The Profile of Early-Learning Tutors

> Early-learning tutors come mostly from teacher-training campuses, with primary-teacher and early-childhood-teacher programs most represented.

Who guides a child at the earliest stage? The educational background of early-learning tutors is dominated by teacher-training campuses that prepare educators of children. Primary Teacher Education (PGSD) is the most represented, followed by Early Childhood Teacher Education (PGPAUD).

Representation index of early-learning tutors by educational background (top = 100)



Relative index, top background = 100. Absolute figures are not shown.

The dominance of child-teaching backgrounds carries real meaning. Tutors from PGSD and PGPAUD bring an understanding of a child's developmental stage, ways to build interest in learning, and teaching techniques suited to early ages. Psychology and language-education backgrounds enrich the range of approaches, from managing a child's emotions to language exposure.

> **A GROUNDING IN CHILD PEDAGOGY**
>
> Guiding young children calls for patience and an understanding of their developmental stage. The prevalence of PGSD and PGPAUD backgrounds is

> an important asset for gentle, well-targeted support.

Quality still varies by individual, so tutor selection and development determine the quality of service. The representation of child-teaching backgrounds offers a good starting point, provided it is paired with ongoing development that keeps the approach joyful.

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

11 External sources (cited)

Families and Investing in Learning from the Start

> Family aspirations to carry a child further, amid rising education costs, drive investment in learning from the earliest years.

The decision to support a child's learning from early on is rooted in family aspiration. Statistics Indonesia recorded Mean Years of Schooling for people aged 25 and over at 8.85 years in 2024, equivalent to the early grades of junior secondary school, while Expected Years of Schooling for a seven-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 secondary)
Expected Years of Schooling (age 7)	13.21 years (≈ senior secondary/diploma)
Human Development Index	75.02

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

The gap between what the parents' generation attained and what is hoped for the children's generation is the engine of family aspiration. Parents striving to carry a child further tend to begin earlier, and the pre-school years become the first point of that learning investment. Joyful early literacy is seen as the opening step of a long journey.

The rising burden of education costs sharpens the family calculation. Household education spending climbs steeply with each stage per the Susenas MSBP 2024, with primary school at around Rp4.6 million per year. Building a strong learning foundation early feels like a rational preparation for the costs of the stages ahead.

> START EARLIER, REST EASIER

> Families who build a child's learning habits from early on feel steadier facing the school transition. Investing in a joyful literacy foundation becomes part of a family's long-term aspiration.

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

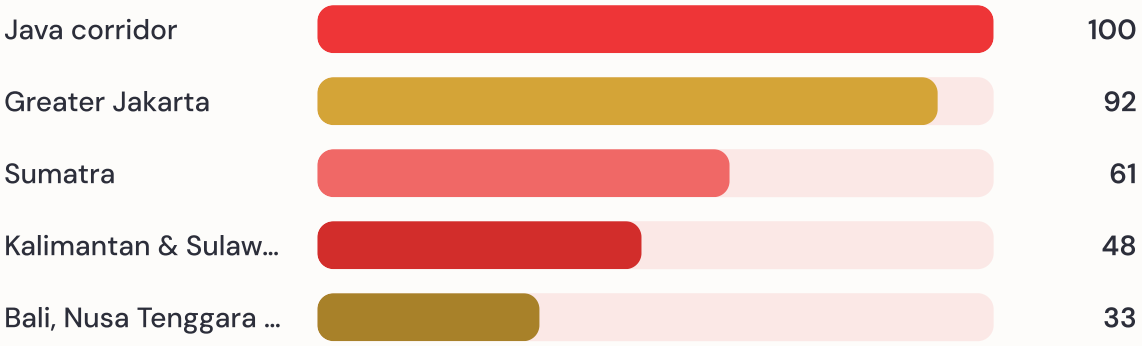
12 Indexed internal + external sources

The Regional Face of Early-Learning Demand

> Early-learning demand runs thickest along the Java corridor and metropolitan areas, while developing regions call for a different outreach.

The map of early-learning demand follows population distribution and the maturity of education services. The Java corridor and the Greater Jakarta metropolitan area hold the highest demand index, in line with the density of young families and the availability of quality tutors.

Early-learning demand index by region (highest = 100)



Relative index across regions, highest = 100. Absolute figures are not shown; small-sample regions are suppressed for representativeness.

This concentration aligns with the distribution of higher-education centers that supply tutors from child-teaching backgrounds, especially along the Java corridor. Metropolitan areas show dense, differentiated demand, from school readiness to early language and Quran reading, in line with urban family aspirations.

In developing regions, the need for early learning is real, while the depth of local tutor supply is still growing. This is where online classes and regional-campus outreach act as a bridge, shortening the distance between families and quality tutors, wherever digital infrastructure reaches.

EQUITY FROM THE EARLIEST YEARS

A strong learning foundation should be within reach of a child wherever they live. Tutor outreach into developing regions and the leveling of digital infrastructure are the keys to closing the early-learning access gap.

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

13 Indexed internal + external sources

Implications and Recommendations

> The report's findings point to steps for families, service providers, and policymakers around healthy, equitable early learning.

For families

1. Begin early literacy through play, protecting a child's rest and free time.
2. View school readiness as a whole: social, emotional, and interest in learning, with literacy and numeracy as one part within it.
3. Match intensity to a child's age; the younger the child, the lighter and more joyful the support.

For service providers

1. Design early-learning programs aligned with the six foundational abilities and the national PAUD curriculum.
2. Prioritize tutors with child-teaching backgrounds (PGSD, PGPAUD) supported by ongoing pedagogical development.
3. Widen reach into developing regions through local tutors and online support.

For policymakers

1. Expanding access to quality PAUD will directly strengthen a child's learning foundation from early on.
2. Enforcing the ban on entrance testing at primary-school admissions keeps the transition joyful.
3. Support for families and the leveling of digital infrastructure shorten early-learning access gaps across regions.

14 Indexed internal + external sources

Outlook: The Direction of Early Learning in 2026 and Beyond

> Early learning will increasingly be seen as a whole foundation, with joyful literacy within it, while awaiting a longer data range.

Three directions appear to be strengthening. First, school readiness will be understood more fully, blending literacy and numeracy with a child's social and emotional maturity. Second, the starting age tends to hold within the pre-school range, making a developmentally appropriate approach ever more important. Third, the strengthening of national PAUD will widen the base of children building a foundation from the start.

This report is a snapshot of one period, so its direction is indicative. Future editions will widen the time range so full seasonality and year-to-year change become readable, forming the basis for a richer early-learning index from year to year.

> *A foundation laid patiently in the earliest years upholds the whole learning journey that follows.*
>
> — 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 (indices, rankings, or shares), without absolute figures. The external lane comes from official sources and is quoted directly. This separation preserves confidentiality alongside credibility.

Data window

Internal demand data cover the period February–June 2026. Because this range is short, the report is framed as a snapshot of the current state of early learning; a year-on-year trend analysis awaits a longer data window. Claims about policy direction rest on official national documents.

Definitions

Early-learning demand is measured from requests for support for children at the PAUD stage and early primary grades, spanning school readiness, literacy-numeracy, reading, counting, writing, children's language, and Quran reading. Kindred labels are merged into a single category.

Masking & confidentiality

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

Alignment

The representation index of educational backgrounds and regional distribution are read alongside the national distribution of students and higher-education centers (PDDikti/BPS) so they reflect the true market structure and stay clear of sample distortion.

Representativeness

Data cells with small samples are suppressed to preserve representativeness and privacy. The reading focuses on categories and regions with adequate data support.

Limitations

As a snapshot of one period, this report does not yet capture full seasonality or year-to-year change in early-learning demand. The age-shift index is a snapshot composition; it does not measure a rate of change across years. Future editions will enrich the time range so long-term trends can be read.

References

[1] Law No. 20 of 2003 on the National Education System, Government of the Republic of Indonesia (2003)

[2] Government Regulation No. 17 of 2010 on the Management and Administration of Education, Government of the Republic of Indonesia (2010)

[3] Merdeka Belajar Episode 24: A Joyful Transition from PAUD to Primary School, Ministry of Education, Culture, Research, and Technology (2023)

[4] Gross Enrollment Rate (APK) of Children Attending Early Childhood Education (PAUD) by Province, Statistics Indonesia (BPS) (2024)

[5] Early Childhood Education (PAUD) Statistics 2024/2025, Ministry of Primary and Secondary Education (Kemendikdasmen) (2025)

[6] Regulation of the Minister of Education No. 12 of 2024 on the PAUD, Primary, and Secondary Curriculum, Ministry of Education, Culture, Research, and Technology (2024)

[7] Presidential Regulation No. 60 of 2013 on Holistic-Integrative Early Childhood Development, Government of the Republic of Indonesia (2013)

[8] PISA 2022 Results, Country Note: Indonesia, OECD (2023)

[9] Human Development Index 2024, Statistics Indonesia (BPS) (2024)

[10] Education Support Statistics 2024 (Susenas MSBP), Statistics Indonesia (BPS) (2024)

[11] Indonesia Internet Penetration Survey 2024, Indonesian Internet Service Providers Association (APJII) (2024)

[12] Higher Education Statistics 2025, PDDikti, Ministry of Higher Education, Science, and Technology (2025)

APPENDICES A

Indexed Data Tables

A summary of every index used in this report. All values are relative (indexed) and do not represent absolute counts.

A.1 Demand index by early-learning aim (highest = 100)

Learning aim	Index
Primary-school readiness	100
Foundational literacy-numeracy	88
Fluent reading	74
Early counting / numeracy	66
English for children	52
Quran reading for children	47

Absolute figures are not shown; small-sample categories are suppressed.

A.2 Share of demand by child age group

Age group	Share
Age 5–6	≈38%
Age 6–7	≈33%
Age 4–5	≈18%
Age 3–4	≈11%

Internal demand composition, Feb–Jun 2026.

A.3 Share of early-learning modes

Mode	Share

Mode	Share
In-person	≈84%
Online	≈10%
Shared venue	≈6%

Internal demand composition, Feb–Jun 2026.

APPENDICES B

Glossary

- Calistung: Indonesian shorthand for reading, writing, and counting; the basic skills of early literacy and numeracy.
- PAUD: Early Childhood Education, the education stage for children aged 0–6.
- APK (Gross Enrollment Rate): the ratio of learners at a stage to the target-age population of that stage.
- Foundational abilities: the six basic child abilities under Merdeka Belajar Episode 24, replacing a focus on entrance testing.
- Indexed value: a figure relative to a given base (e.g. highest = 100), not an absolute count.

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