RESEARCH REPORT · EDUPOINT EDUCATION RESEARCH | EDISI 2026

Most In-Demand Subjects 2026

A ranking of private tutoring demand, from mathematics to artificial intelligence, and how it shifts between the odd and even semesters.

EduPoint Research Team • Data window: 2025-07/2026-06 • Indonesia • 29 min read • 24 pages

ABSTRACT

Private tutoring demand in Indonesia in 2026 is led by Mathematics, followed by English and early-childhood literacy-numeracy. Quran reading holds steady, while coding and artificial intelligence rise as both enter the national curriculum. This ranking shifts sharply by season: test preparation peaks in the even semester, early literacy in the odd semester. The report presents every figure as a relative index.

Executive Summary

The question families in Indonesia ask most often concerns one thing: which subject matters most for a child's future. This report answers it by mapping private tutoring demand across a full school year, from the odd semester of 2025 to the even semester of 2026, and arranging it into an honest indexed ranking of what is genuinely sought.

At the top of the ranking sits Mathematics, the benchmark for the entire index. English follows, then early-childhood literacy-numeracy, a sign of how early families begin to support learning. Science, Quran reading, and test preparation

form the middle layer, while coding and artificial intelligence close the top eight as the fastest-growing categories.

This ranking does not stay still across the year. Test preparation surges in the even semester as the university selection season nears, early literacy peaks in the odd semester as the new school year opens, and Quran reading strengthens in the even semester that overlaps with Ramadan. Coding and artificial intelligence rise after both formally entered the national curriculum in the 2025/2026 school year.

All internal figures are presented as relative indices to preserve confidentiality, while factual claims rest on official regulations and statistics. The report captures the structure and rhythm of demand, showing how it is shaped and when it moves, so families and providers can read the market's direction with greater calm.

Key Findings

1. Mathematics leads private tutoring demand in 2026 with an index of 100, followed by English (78) and early-childhood literacy-numeracy (61).

2. Early literacy-numeracy is the third-largest category and peaks in the odd semester, with a seasonal index of 124 as the new school year begins.

3. Test preparation swings most sharply by season: its index climbs to 132 in the even semester, following the national university selection calendar.

4. Coding and artificial intelligence grow from the margins, in line with the entry of Coding and Artificial Intelligence as an elective into the national curriculum for the 2025/2026 school year.

5. Quran reading holds as steady demand, peaking in the even semester that

6. Six of the eight top categories show a clear seasonal pattern, making the

overlaps with the month of Ramadan.

timing of a lesson as important as the choice of subject.

01 External sources (cited)

Introduction: Reading Subject Demand

> Private tutoring demand moves with curriculum needs, exam pressure, and family aspirations, making the subject ranking a mirror of the nation's learning priorities.

Every family that seeks private tutoring is, in truth, declaring a priority. The choice of subject reveals what they consider most decisive for a child's future, whether that is mastery of a cumulative concept, readiness for a selection exam, or a skill the school has yet to teach. This report reads that collection of choices as a signal, then arranges it into a measurable ranking.

WHAT MOST IN-DEMAND MEANS

The most in-demand subject is the category with the highest private tutoring demand in a given period. In this report that volume is translated into a relative index, with the leading category set at 100 and every other category measured against it.

Reading demand as a ranking offers two benefits at once. For families, it shows which subjects most often call for extra support, so a learning plan feels better considered. For service providers, it maps where needs concentrate, along with the gaps that remain thinly served.

Scope and how to read it

The report covers private tutoring demand across Indonesia over a full school year, spanning early childhood through university-entrance preparation. The eight leading categories are analyzed in depth, from Mathematics to artificial intelligence. Each internal figure is presented in indexed form as the structure and direction of demand, while external facts are cited directly from official regulations and statistics with clear markers.

02 External sources (cited)

Context: The Curriculum That Shapes Demand

> National curriculum policy, from strengthening literacy and numeracy to introducing the Coding and Artificial Intelligence subject, helps determine which subjects families seek most.

Private tutoring demand does not arise in a vacuum. It follows the curriculum in force at school, because families seek support for material deemed most challenging or most decisive. Through Regulation of the Minister of Education, Culture, Research, and Technology No. 12 of 2024, the Merdeka Curriculum was set as the national curriculum framework for early childhood, primary, and secondary education, with an emphasis on strengthening literacy and numeracy.

TWO DECISIVE CURRICULUM POLICIES

Permendikbudristek No. 12 of 2024 sets the Merdeka Curriculum as the national framework that strengthens literacy and numeracy. Permendikdasmen No. 13 of 2025 adds Coding and Artificial Intelligence as an elective subject starting in the 2025/2026 school year.

The emphasis on numeracy fuels demand for Mathematics, while the push on literacy underpins the need for English and early-childhood literacy-numeracy. In the 2025/2026 school year this landscape widens, with digital skills becoming a formal part of the curriculum, something that previously lived only in extracurricular activities.

Through Regulation of the Minister of Primary and Secondary Education No. 13 of 2025, the Coding and Artificial Intelligence elective began to roll out in phases from grade 5 of primary school, grade 7 of junior secondary, and grade 10 of senior secondary, with an allocation of two lesson hours per week. This formal entry explains why demand for coding and artificial intelligence tutoring moves up from the margins toward the mainstream.

CURRICULUM AS A DEMAND TRIGGER

> Every curriculum emphasis leaves a mark on tutoring demand. Numeracy thickens Mathematics, literacy underpins language and early learning, and new policy grows interest in coding and artificial intelligence.

Source: Permendikbudristek No. 12 of 2024; Permendikdasmen No. 13 of 2025 on Coding and Artificial Intelligence; internal EduPoint analysis (indexed).

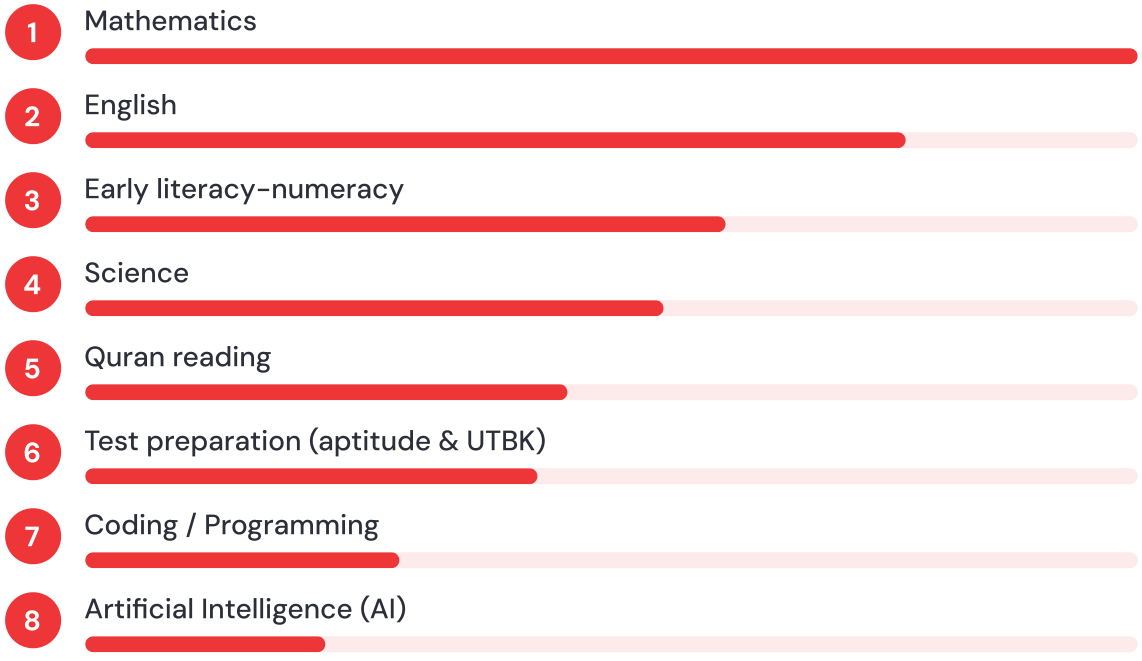
03 Edupoint internal analysis (indexed)

The Main Ranking: Subject Demand Index 2026

> Mathematics leads private tutoring demand in 2026 at an index of 100, followed by English, early literacy-numeracy, and Science, while coding and artificial intelligence close the top eight as the fastest-growing categories.

Mathematics stands at the top of private tutoring demand across this school year, cementing its place as the core learning need of Indonesian families. English follows at an index of 78, then early-childhood literacy-numeracy at 61, a figure that marks how early families begin seeking support.

Private tutoring demand index by subject, 2025/2026 school year (Mathematics = 100)



Relative demand index, leading category = 100. Indonesian and English labels for the same subject are merged; absolute figures are not shown; small-sample categories are suppressed to protect representativeness.

The middle layer of the ranking holds Science at an index of 55, Quran reading at 46, and test preparation at 43. These three represent different needs: academic

mastery, the shaping of character and faith, and readiness for selection. Coding and artificial intelligence close the top eight at 30 and 23, figures that look small yet move faster than any other category.

> THE 2026 TOP THREE
>
> **Mathematics (index 100), English (78), and early literacy-numeracy (61) hold the three leading positions in private tutoring demand across the 2025/2026 school year.**
>
> — Internal EduPoint analysis (indexed)

This ranking describes demand structure across a full school year, damping the seasonal bias discussed in a dedicated chapter. Each leading category is examined more closely in the chapters that follow, from why Mathematics holds the top to why coding and artificial intelligence climb.

Source: Internal EduPoint analysis (indexed), private tutoring demand from July 2025 to June 2026.

04 Indexed internal + external sources

Mathematics: The Enduring Peak

> Mathematics leads demand because of its cumulative nature and a national numeracy result still below the international average, so families seek support the moment a child falls behind.

Mathematics holds the top of demand because of its cumulative nature. A single missed concept blocks the one built upon it, so a gap accumulates quickly when left unaddressed. This is precisely why families move fastest to seek support the moment a child stalls on a topic.

That pressure is reinforced by national numeracy results. The 2022 Programme for International Student Assessment (PISA) recorded Indonesia's mathematics score at 366, well below the OECD average of 472, with only about 18 percent of students reaching the minimum level of numeracy proficiency. The distance between what is taught and what is truly mastered is what most often drives families toward mathematics tutoring.

PISA 2022 scores: Indonesia vs OECD average

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

Source: OECD, PISA 2022 Results (Country Note: Indonesia). All three domains sit below the OECD average, with mathematics as the widest gap.

WHY MATHEMATICS IS HARD TO UNSEAT

The cumulative nature of Mathematics means one unmastered topic affects the next. High weight in selection exams combined with a numeracy result below average keeps its demand the thickest and the most durable.

Demand for Mathematics also spreads evenly across all levels, from basic arithmetic in primary school to calculus and quantitative reasoning ahead of university entrance. This breadth across levels is what keeps it the benchmark for the entire demand index.

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

05 Indexed internal + external sources

English: A Global Gateway from an Early Age

> English takes second place in demand as a gateway to higher education, global literature, and cross-border work, while the national literacy challenge thickens its need.

English takes second place in demand because its function reaches beyond the classroom. It serves as a gateway to higher education, global literature, and cross-border work, so families treat its mastery as a long-term asset. The national curriculum introduces it early, and family aspirations for international study and careers thicken the demand.

The literacy challenge also plays a part. Indonesia's reading score on PISA 2022 stood at 359 against the OECD average of 476, revealing wide room for improvement in comprehending text. Because mastering a foreign language rests on strong literacy, families link English tutoring to efforts that improve both reading and speaking.

> A STEADY SECOND PLACE
>
> **English sits at an index of 78, the second-strongest position across the school year, with demand relatively even between the odd and even semesters.**
>
> — Internal EduPoint analysis (indexed)

Demand for English spans a wide range of needs, from everyday conversation and school-exam preparation to building scores for further study. This variety keeps its demand more even across the year than categories tied to a selection calendar, a pattern detailed in the seasonal chapter.

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

06 Indexed internal + external sources

Early Literacy-Numeracy: The Gateway of Early Childhood

> Early literacy-numeracy takes third place in demand even though schools are barred from testing it at admission, because families build a child's reading, writing, and counting foundation before primary school.

Reading, writing, and counting, known in Indonesia as calistung, take third place in demand at an index of 61. A figure this high shows how early Indonesian families begin to support a child's learning, long before the full primary level.

What stands out is that this demand strengthens precisely as education policy shifts the role of early literacy testing. Through the Joyful Transition from Early Childhood to Primary School movement, launched as Merdeka Belajar Episode 24 in 2023 and reinforced by Circular Letter No. 0759/C/HK.04.01/2023, schools were asked to remove literacy-numeracy tests from student admission. This aligns with Ministerial Regulation No. 1 of 2021 on New Student Admission.

SIX FOUNDATIONAL ABILITIES

In place of a literacy-numeracy test, the transition policy emphasizes six foundational abilities of a more holistic kind, covering emotional maturity, social skills, independence, and a base of literacy and numeracy built without exam pressure.

Removing the test at the school gate does not erase a family's wish to prepare a child. Some parents still seek support so a child grows comfortable with letters and numbers before entering the early grades, through a joyful and pressure-free approach. Demand for early literacy-numeracy thus moves from a test-passing orientation toward building a foundation for learning.

A SHIFT IN MEANING

> The transition policy moves early literacy-numeracy from a school-entry requirement to a foundation for learning. Demand that stays high shows families welcome this foundation, so long as it is delivered in a child-friendly way.

Source: Kemendikbudristek, Merdeka Belajar Episode 24 (Joyful Transition from Early Childhood to Primary School); Circular Letter No. 0759/C/HK.04.01/2023; Permendikbudristek No. 1 of 2021 on New Student Admission; internal EduPoint analysis (indexed).

07 Indexed internal + external sources

Quran Reading: A Foundation of Character and Faith

> Quran reading holds as steady demand across the year because it ties academic learning to the shaping of character and faith, peaking in the even semester that overlaps with Ramadan.

Quran reading sits at an index of 46 and is among the steadiest categories of demand across the year. For many Muslim families in Indonesia, support for reading the Qur'an runs alongside academic education, tying the mastery of knowledge to the shaping of character and faith.

Religious education holds firm ground in the national system. Law No. 20 of 2003 on the National Education System places religious education as compulsory content at every level, so strengthening a child's ability to read scripture outside school is a natural complement for families.

> **CALM AND DURABLE DEMAND**
>
> Quran reading is not tied to a selection calendar, so its demand flows calmly across the year. Its peak arrives in the even semester that overlaps with Ramadan, when families' resolve to strengthen a child's recitation rises.

Demand for Quran reading rounds out the picture that private tutoring serves needs wider than report-card grades. Families seek a balance between academic skill and spiritual grounding, and private tutoring meets both with tutors suited to each home's needs.

Source: Law No. 20 of 2003 on the National Education System; internal EduPoint analysis (indexed).

08 Indexed internal + external sources

Coding and Artificial Intelligence: The Digital Skills Wave

> Coding and artificial intelligence grow fastest among all categories, in line with the entry of Coding and Artificial Intelligence as an elective into the national curriculum for 2025/2026.

Coding and artificial intelligence close the top eight at indices of 30 and 23, figures that look small yet hold the fastest growth of any category. Both move from a marginal interest toward a need that families in larger cities begin to weigh seriously.

The main trigger is curriculum policy. Through Permendikdasmen No. 13 of 2025, the Coding and Artificial Intelligence elective formally entered the national curriculum and began rolling out in phases in the 2025/2026 school year, starting from grade 5 of primary school, grade 7 of junior secondary, and grade 10 of senior secondary, with two lesson hours per week. When a skill becomes a formal part of the report card, families move to prepare a child earlier.

Digital-skills demand growth index, odd to even semester (odd semester = 100)

Relative growth index, odd semester = 100 as the base. It shows the direction of demand movement, not absolute volume; absolute figures are not shown.

THE FASTEST-GROWING CATEGORY

Demand for artificial intelligence grows fastest among all categories, followed by coding, both far above the average pace of demand growth.

> — Internal EduPoint analysis (indexed)

This subject is designed to equip students with logical thinking, problem solving, and an understanding of digital ethics. Families who sense this direction treat coding and artificial intelligence as a real asset for the future, a skill that will keep being used. This wide room to grow is what private tutoring providers would do well to anticipate.

Source: Permendikdasmen No. 13 of 2025 on Coding and Artificial Intelligence; internal EduPoint analysis (indexed).

09 External sources (cited)

Test Preparation: The Seasonal Rhythm of National Selection

> Test preparation is the category with the sharpest seasonal swing because it is tied to a university selection calendar that draws hundreds of thousands of candidates each year at high competitiveness.

Test preparation sits at an index of 43 across the year, yet this annual figure hides the sharpest seasonal swing of any category. Its center is the National Selection Based on Test (SNBT) through the Computer-Based Written Exam (UTBK), the main gateway to state universities, whose schedule centers on the even semester.

UTBK-SNBT 2025 statistics (SNPMB)

Indicator	Number
Registrants	860,976
Attended the exam	829,790
Declared admitted	253,421
Competitiveness	about 29%

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

With competitiveness at about 29 percent, nearly seven of every ten registrants do not pass through this path. Pressure of that scale drives families to prepare a child well in advance, and demand for test preparation peaks in the months before the exam, throughout the even semester.

> SNBT 2025 COMPETITIVENESS
>
> **Of 860,976 registrants, 253,421 were admitted, about 29 percent. This competition is what drives demand for test coaching as the**

> **selection season nears.**
>
> — SNPMB, UTBK-SNBT 2025 Data

The material tested, covering general reasoning, quantitative knowledge, and literacy in Indonesian and English, overlaps directly with the Mathematics and English categories. This overlap warms part of the academic demand during the selection season, reinforcing the seasonal pattern discussed in the next chapter.

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

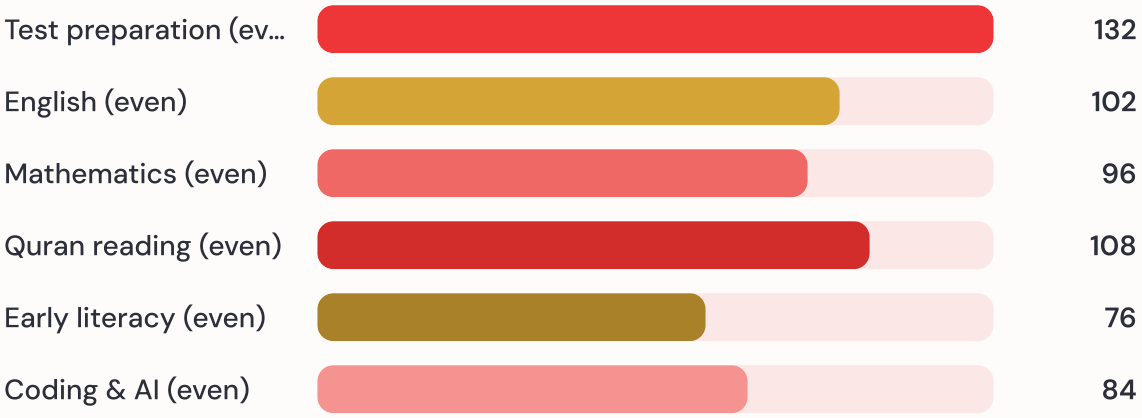
10 Edupoint internal analysis (indexed)

The Seasonal Shift: Odd and Even Semesters

> The subject ranking shifts sharply by season: test preparation and English strengthen in the even semester, while early literacy-numeracy and digital skills peak in the odd semester.

The demand ranking that looks stable on an annual average in fact pulses strongly by season. Indonesia's school year divides into an odd semester, running July to December, and an even semester, January to June. Each subject category carries its own rhythm between these two halves.

Seasonal demand index by subject (each category's annual average = 100)



Relative seasonal index, each category's annual average = 100. Values above 100 mark a seasonal peak, below 100 a trough; absolute figures are not shown. The chart shows the even-semester side.

Seasonal demand index, odd and even semesters (annual average = 100)

Subject	Odd Semester (Jul-Dec)	Even Semester (Jan-Jun)
Test preparation	68	132
Early literacy-numeracy	124	76
Coding & AI	116	84
Mathematics	104	96

Subject	Odd Semester (Jul-Dec)	Even Semester (Jan-Jun)
English	98	102
Quran reading	92	108

Each row's two semesters average to 100 (annual base). Source: internal EduPoint analysis (indexed).

Test preparation swings the widest. Its index falls to 68 in the odd semester, then leaps to 132 in the even semester as the SNBT schedule nears. Early literacy-numeracy moves in the opposite direction: it peaks at 124 in the odd semester as the new school year opens and families prepare a child for primary school, then eases in the even semester.

> **TWO OPPOSING RHYTHMS**
>
> Early literacy-numeracy and coding peak at the start of the school year, when families prepare new groundwork. Test preparation peaks in the second half, as the selection season nears. Reading these rhythms helps families choose when to begin a lesson more precisely.

Coding and artificial intelligence strengthen in the odd semester, following the rollout schedule of the elective subject that begins early in the school year. Quran reading rises slightly in the even semester that overlaps with Ramadan, while Mathematics and English move the most evenly because their need spreads across all levels and seasons.

Source: Internal EduPoint analysis (indexed); national education calendar and SNPMB 2025 selection schedule.

11 Indexed internal + external sources

Implications and Recommendations

> The ranking and seasonal rhythm of demand point to steps for families, service providers, and education policymakers.

For families

1. Prioritize cumulative subjects such as Mathematics early, before a gap piles into a distance that is hard to close.
2. Align test preparation with the national selection calendar, since the even semester is its peak season.
3. Introduce early literacy-numeracy and digital skills at the start of the school year, when a child's learning momentum is strengthening.

For service providers

1. Prepare test-preparation capacity ahead of the even semester and early-literacy capacity ahead of the odd semester, following the two opposing seasonal peaks.
2. Build coding and artificial intelligence programs aligned with the national curriculum, using the momentum of the elective subject's entry.
3. Maintain the quality of Quran-reading and language tutors so that steady year-round demand is served consistently.

For policymakers

1. Strengthening literacy and numeracy directly shapes the subjects families seek most, so it deserves continued attention.
2. Rolling out the Coding and Artificial Intelligence subject opens a need for teacher training distributed evenly across regions.
3. The joyful transition from early childhood to primary school deserves support, so that early-literacy tutoring grows as a foundation builder and a source of

ease.

12 Indexed internal + external sources

Outlook: The Direction of Demand in 2026 and Beyond

> Mathematics will hold the top, digital skills mature into the mainstream, and the seasonal pattern becomes better understood as part of family learning plans.

Three directions look set to strengthen into the next school year. First, Mathematics will hold the peak of demand because of its cumulative nature and its weight in selection. Second, coding and artificial intelligence move from the margins into the mainstream, supported by their presence as formal subjects. Third, the seasonal pattern will grow better understood by families as part of a learning plan.

This report captures a full school year, so its odd and even rhythms already read clearly. Future editions will link several school years so that year-on-year change becomes visible, while refining the mapping of new categories such as artificial intelligence whose growth is still on the move.

> *Knowing what is most sought is the first step to supporting learning at the right time.*
>
> — EduPoint Research Team

Methodology & Limitations

This report combines two data lanes. The internal lane draws from private tutoring demand on the EduPoint platform and is presented in indexed form as an index, ranking, or share, without absolute figures. The external lane draws from official regulations and statistics cited directly. This separation preserves confidentiality while keeping credibility.

Data window

Internal demand spans a full school year, July 2025 to June 2026, so the annual ranking damps seasonal bias. The seasonal analysis compares the odd and even semesters within the same range.

Ranking definition

Demand is counted from incoming subject requests, then grouped into eight leading categories. Indonesian and English labels for the same subject are merged into one category so the ranking is not split.

Masking and confidentiality

All internal magnitudes are converted into an index, ranking, or relative share, with the leading category as the base of 100. 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.

Seasonal index

The seasonal index is computed by setting each category's annual average at 100, then measuring each semester's demand against it. Values above 100 mark a seasonal peak, below 100 a trough.

Representativeness

Categories with small samples are suppressed to protect representativeness and privacy. The reading focuses on the eight categories with adequate data support.

Limitations

As a snapshot of one school year, the report does not yet capture year-on-year change. New categories such as coding and artificial intelligence are still growing fast, so their positions may shift in future editions. The seasonal figures rest on a single school-year cycle and will be reinforced with additional cycles.

References

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

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[9] Education Statistics 2024, Statistics Indonesia (BPS) (2024)

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 subject (Mathematics = 100)

Subject	Index
Mathematics	100
English	78
Early literacy-numeracy	61
Science	55
Quran reading	46
Test preparation (aptitude & UTBK)	43
Coding / Programming	30
Artificial Intelligence (AI)	23

ID/EN labels merged; absolute figures not shown. Base: 2025/2026 school year.

A.2 Seasonal index, odd and even semesters (each category's annual average = 100)

Subject	Odd (Jul-Dec)	Even (Jan-Jun)
Test preparation	68	132
Early literacy-numeracy	124	76
Coding & AI	116	84
Mathematics	104	96
English	98	102
Quran reading	92	108

Each row's two semesters average to 100 (annual base).

APPENDICES B

Glossary

- Indexed value: a figure relative to a given base (for example, the highest category = 100), not an absolute count.
- Calistung / early literacy-numeracy: the basic abilities of reading, writing, and counting in early childhood.
- Seasonal index: a comparison of each semester's demand against the same category's annual average.
- KKA: the Coding and Artificial Intelligence elective subject under Permendikdasmen No. 13 of 2025.
- SNBT/UTBK: National Selection Based on Test via the Computer-Based Written Exam.
- Odd and even semesters: the two halves of the school year, the odd running July to December and the even January to June.

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