



GoStudent

2021

GoStudent Education Report

Quantitative Research Findings - Europe



KANTAR

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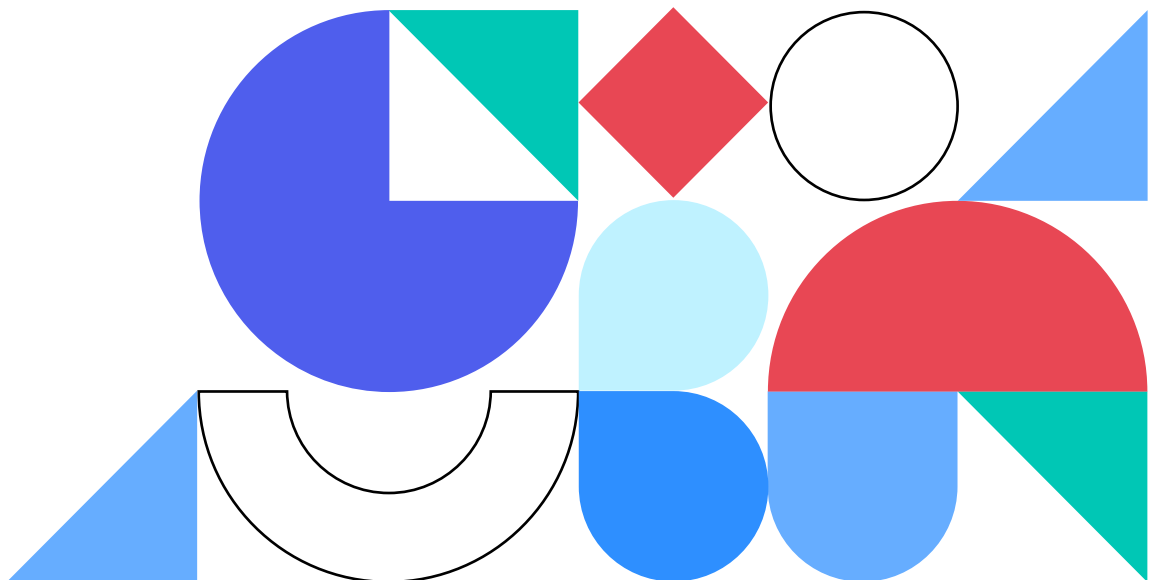


A note from **Felix Ohswald**

As passionate advocates for quality, innovative education, it's our responsibility to keep interrogating the nature and role of education in a world that's driven by change. This world-first interactive data report provides comprehensive evidence of this undertaking, and is the first of many to come.

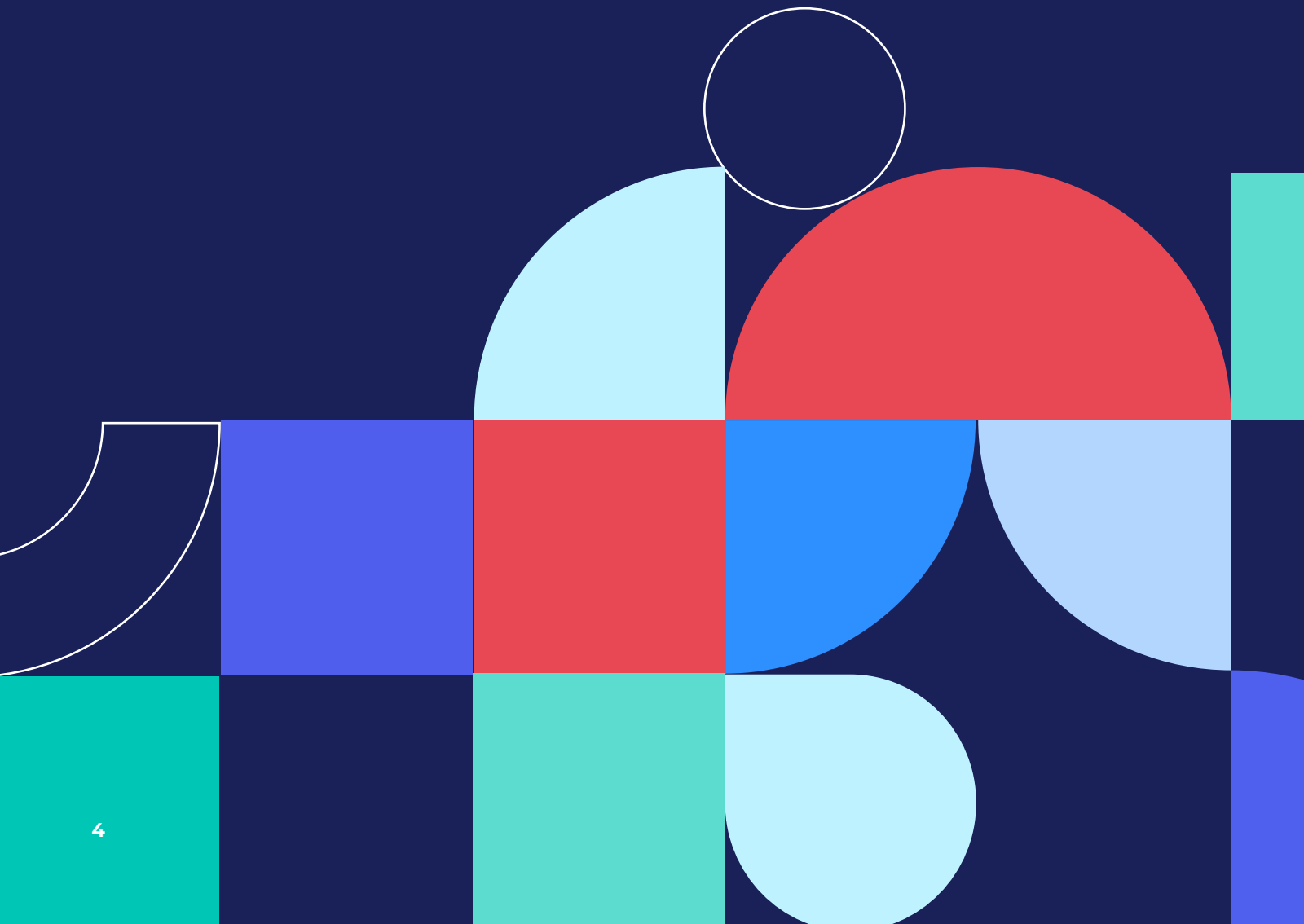
From educational wellbeing, to study habits, learning gaps and adaptive learning, this report tells the fascinating story of how parents and students across Europe have experienced schooling over the last year (2020 - 2021) and aims to uncover valuable insights we can all use to inspire, create and innovate a future where quality education is accessible to all.

**FELIX OHSWALD -
CO-FOUNDER AND CEO, GOSTUDENT**



15

Background and Methodology



Overview

Research Objective

The objective of this research is to better understand learning, online learning, and tutoring behaviour in Europe, from the perspective of both parents and students. GoStudent aims to publish this report on an annual basis to show trends and changes in the field of education and learning over time.

For the 2021 Education Report, questions were included that explored how parents and students perceived “learning in a pandemic world”. The market research was conducted by [Kantar Market Research Institute](#) on assignment of the online tutoring provider, [GoStudent](#).

Research Overview and Methodology

An **online survey (CAWI)** was conducted in seven European markets to capture parents’ and children’s perspectives on educational wellbeing, study habits and the role of tutoring during the last academic year (2020–2021).

Countries surveyed include: Austria, Germany, France, Spain, the Netherlands, United Kingdom and Italy.

A 20-minute survey – 15 minutes for parents and 5 minutes for children – was launched via Kantar’s panel; a panel built with highly validated, permission-based respondents that ensures data is collected in a GDPR-compliant way.

Data was collected from a) parents only and b) parents and their child:

- Parents only (those who didn’t provide consent for a child to participate, or whose children were not present);
- Parents and their child.

The survey was conducted from 1 October to 16 October, 2021

All data in this report is tested at a 95% confidence interval.

The sample chosen by Kantar is representative of parents who are decision-makers for their children’s education, while the sampling has a 95% confidence level to reflect the results of the respective country.

How to read the report

The report is colour coded to highlight parents’ vs children’s perspective.



Parents’
perspective



Children’s
perspective



General /
financial data

Sample Details

Target Criteria

The results from parents represent legal guardians of 10–18-year-olds who are sole or joint decision-makers regarding their child's education.

The results from children represent 10–18-year-olds with parental consent to participate in the study.

Gender*: 52.2% Male | 47.6% Female.

Sample details: (children are a subset of parent sample size)

Sample sizes per country:

- UK, n=1001 parents / n=889 children
- NL, n=1001 parents / n=930 children
- IT, n=1001 parents / n=974 children
- FR, n=1005 parents / n=899 children
- ES, n=1012 parents / n=952 children
- DE, n=1000 parents / n=886 children
- AT, n=265 parents / n=237 children (Austria has a lower size due to the panel size)

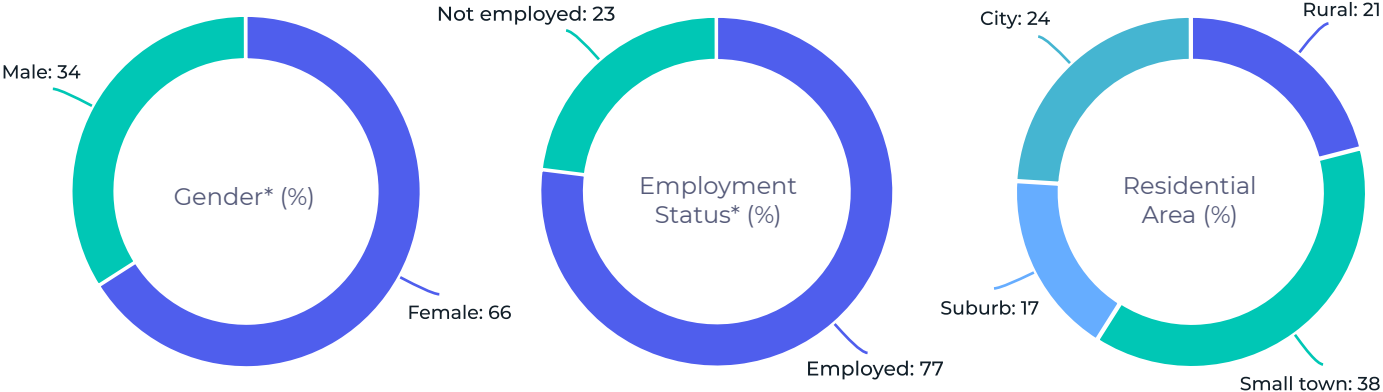
10-18
years



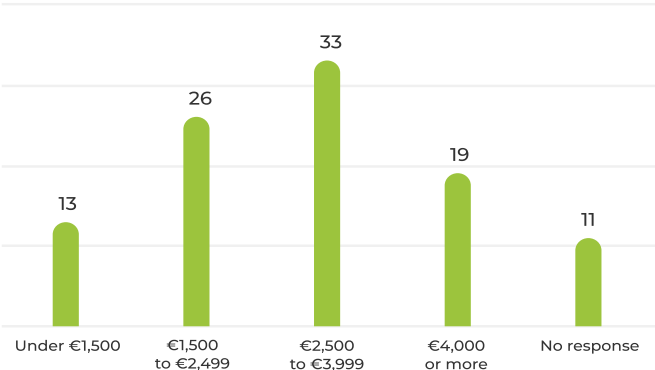
**Gender split: 14 out of 5767 children aged 10–18 who participated in the survey responded that they identify as non-binary. These findings have been omitted, as the figures are not large enough (0.4% in total) in each market to offer a representative sample. This data can, however, be shared on request.*

Demographics

Parent sample, n=6285 | Children sample, n=5767



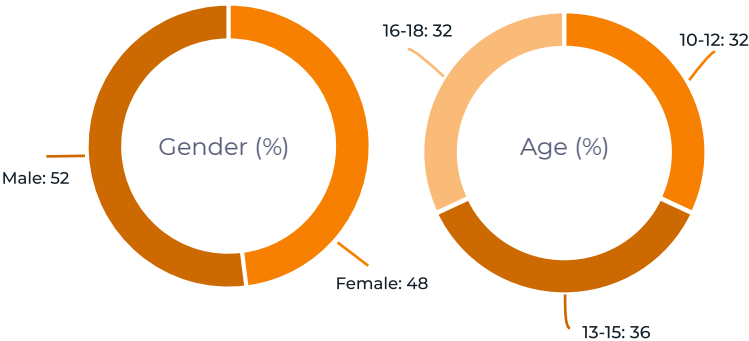
Income, ex UK (%)



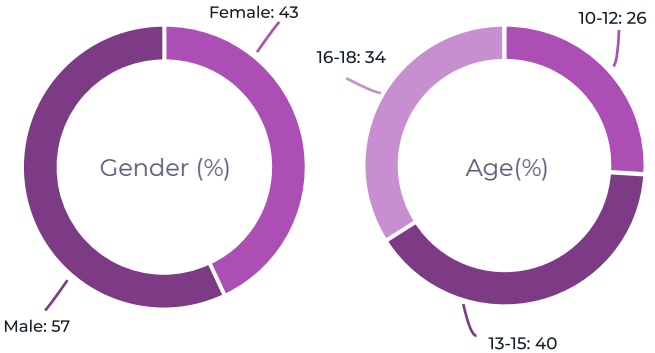
Income, UK only (%)



Demographics of children (Parents' portion)



Demographics of children (Children's portion)



*Gender Split: Non-binary sample too low to report (0.4%)
*Employment status of respondent (not necessarily household)

02

Learning in a Pandemic World

Parents and children equally recognise the challenges children faced during the pandemic.

76%

of parents recognise that their children faced challenges during the pandemic.

- According to their parents, children in Italy faced the most challenges related to education and wellbeing (82%)

- Lack of social connection (55%) was cited as the biggest challenge, which was felt mostly in Italy and by girls aged 16–18 living in large cities with parents who are employed

- Difficulty concentrating in an online classroom environment (36%) was second. The challenge was felt equally across the United Kingdom, the Netherlands, France, Italy, and more among boys aged 10–15 years old living in rural areas or small towns

80%

of children say they faced challenges during the pandemic, sharing the same top three challenges as their parents.

01

Lack of social connection (60%)

- Girls (62%) experienced a greater lack of social connection than boys (59%)

- 16–18-year-olds (63%) found the lack of social connection more challenging than 10–15-year-olds (59%)

02

Difficulty concentrating in an online classroom environment (41%)

- 13–15-year-olds (43%) found it most challenging to concentrate in an online classroom environment

03

Difficulty understanding subject material online (35%)

- 13–15-year-olds (37%) also found it harder to understand subject material online compared to 10–12-year-olds

Children have a more pessimistic view than their parents about the learning gaps caused by the pandemic.

57%

of parents say that their children suffered learning gaps due to COVID-19.

- Boys (35%) suffered more learning gaps than girls (32%) in more than two subjects

- 68% of students in Germany and 65% in France experienced the most learning gaps in one or more subjects, followed by students in Austria (60%), Italy (59%) and Spain (57%)

30%

Most learning gaps occurred in Maths (30%) followed by English (18%).

- Across all countries, students experienced the most learning gaps in Maths, especially female students and 13–18-year-olds

- Germany, followed by Austria, showed the highest amount of learning gaps across all four of the main subjects: Maths, English, Physics and Chemistry

- According to children: 52% say they experienced learning gaps, claiming they were falling behind in Maths (27%) and English (14%)

35%

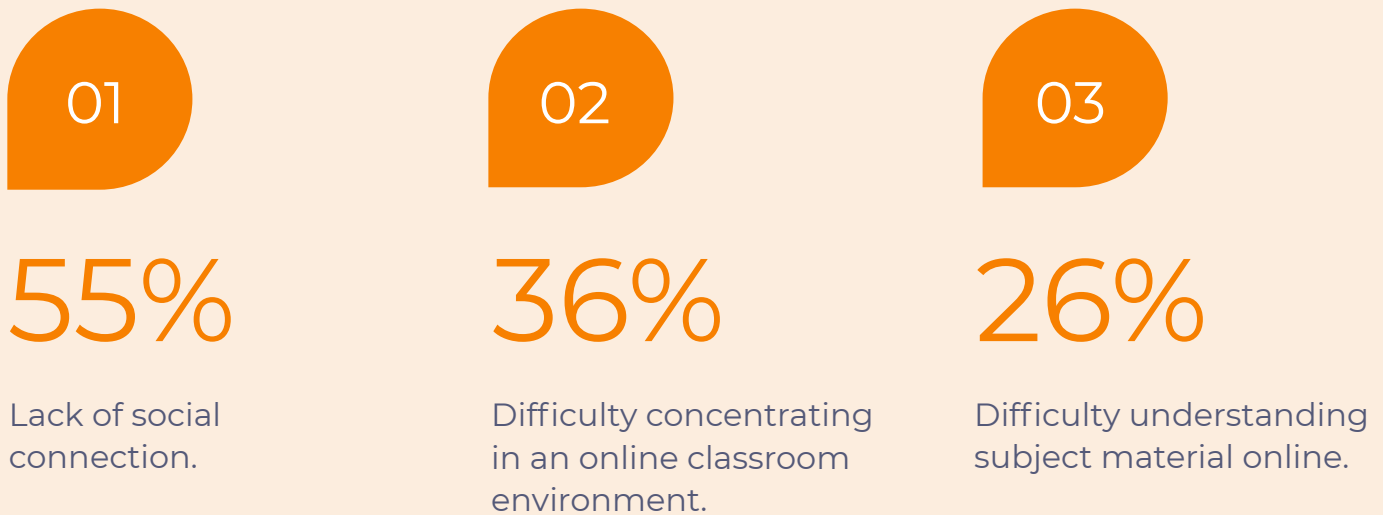
of children believe they will catch up this year, which is more pessimistic than parents (41% believe the learning gap will not continue).

- Children are most optimistic about catching up in Italy (45%) and Spain (51%)

- Boys (37%) are more confident than girls (33%) that they will catch up

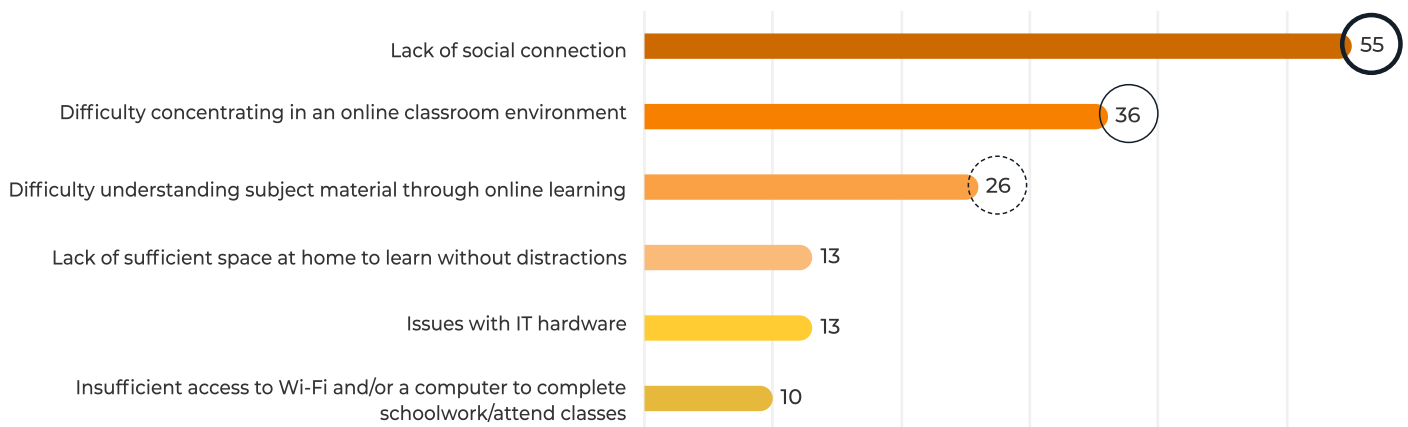
- Children who receive tutoring (46%) are more likely to believe they will catch up than those who don't (31%)

76% of parents recognise that their children faced challenges due to the pandemic.



Challenges during the pandemic (%)

Q15: Which of the following, if any, posed challenges to your child's education and/or overall wellbeing? (due to the pandemic).

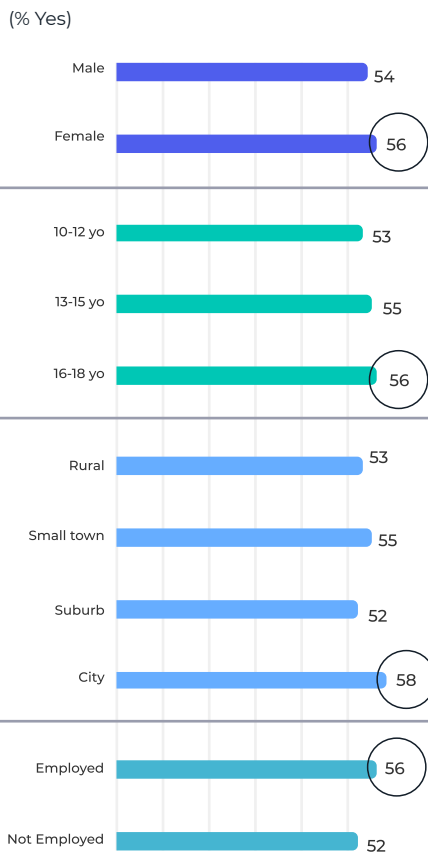


1 1 Greatest significance
2 2 Second place significance
3 3 Third place significance

The challenges were experienced slightly differently based on gender, age group, residential area and whether parents were employed.

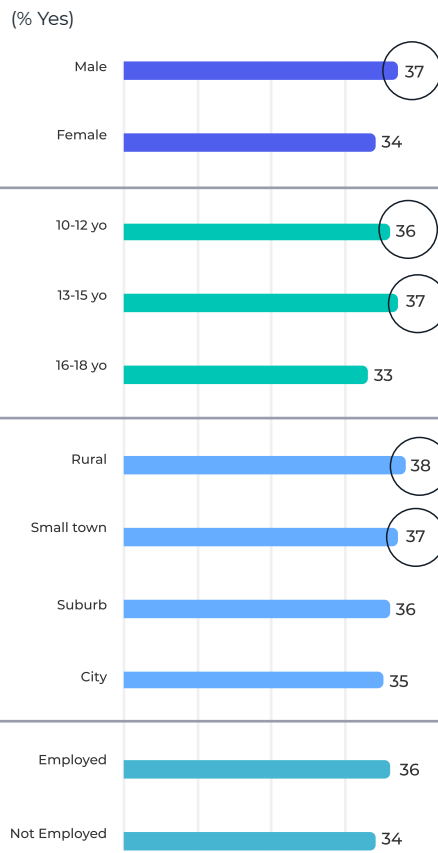
Lack of social connection

Felt more by girls, 16–18-year-olds, and those living in large cities with parents who are employed.



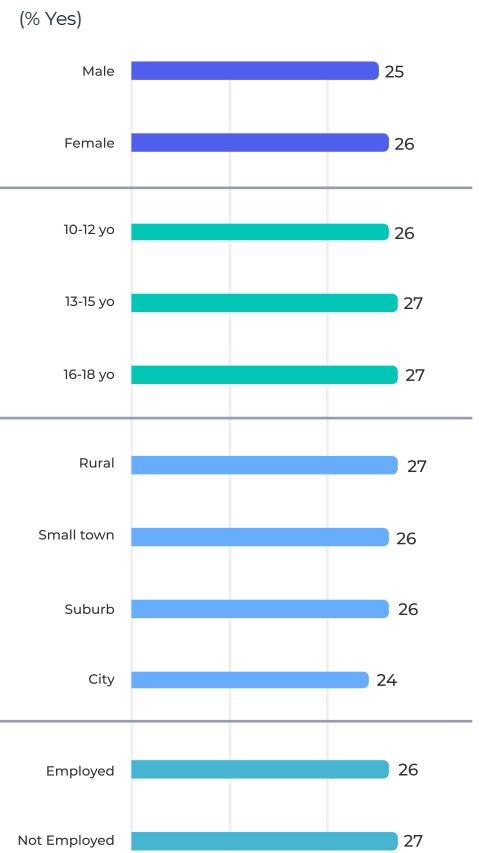
Difficulty concentrating in an online environment

Skewed towards boys, 10–15-year-olds, and those living in a rural area or small town.



Difficulty understanding subject material online

No differences.



Overall n=6285
 Male n=3279 | Female n=2992
 10-12 n=2002 | 13-15 n=2234 | 16-18 n=2029 | Rural n=1321
 Small town n=2381 | Suburb n=1083 | City n=1481
 Employed n=4824 | Not employed n=1460

○ 1 Greatest significance
 ○ 2 Second place significance
 ○ 3 Third place significance

Children in Italy faced the most challenges related to education and wellbeing (82%).



Italy, followed by Austria and Germany, noted the most significant impact of lack of social connection.



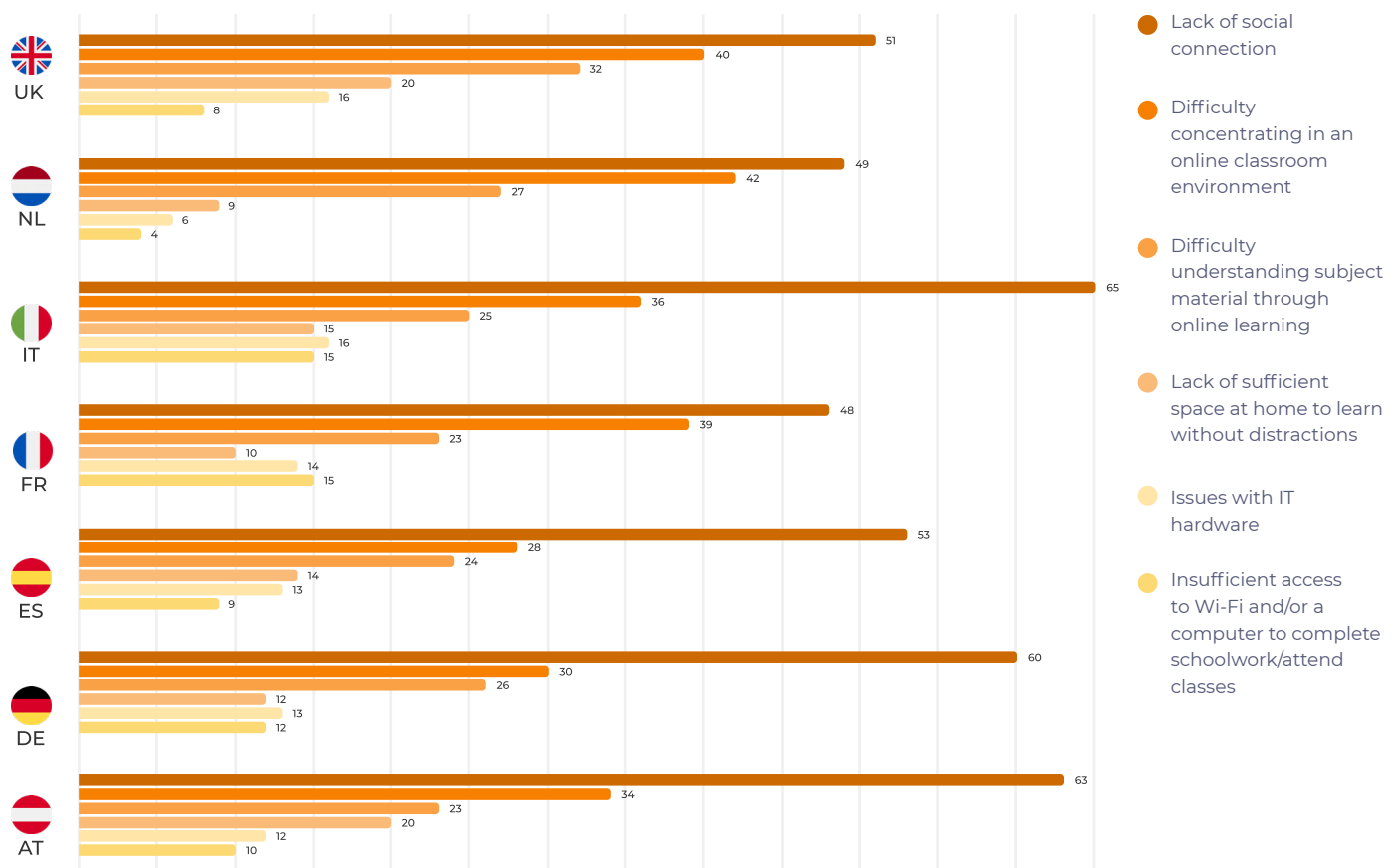
Students in Germany and Spain had the least difficulty concentrating in an online school environment.



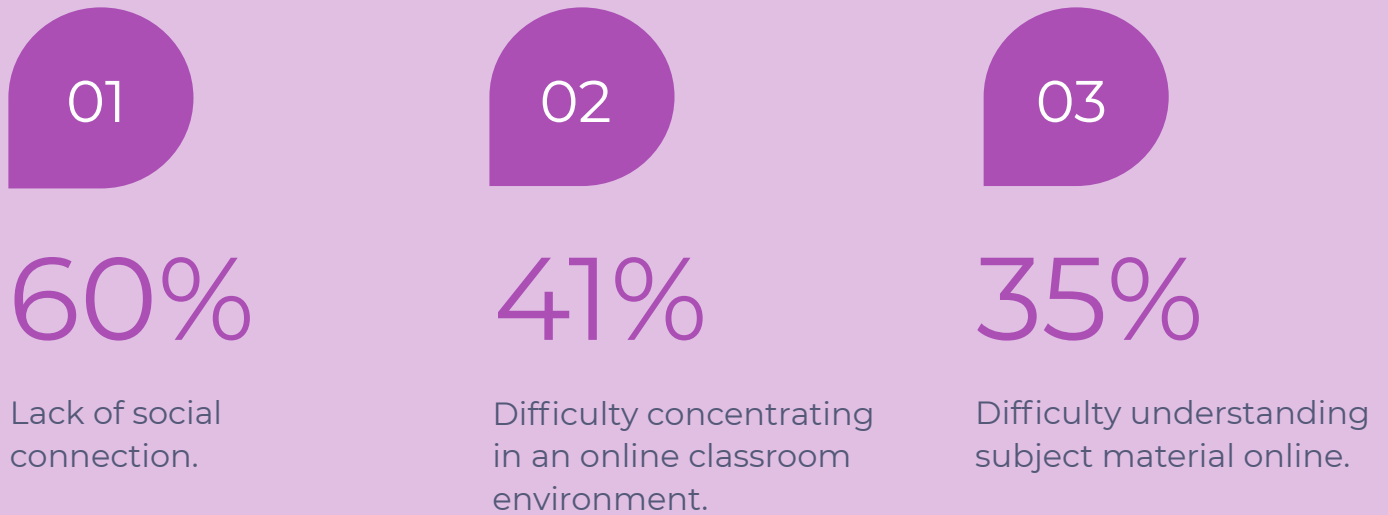
Students in the UK struggled the most understanding subject material online (32%).

Challenges during the pandemic (%)

Q15: Which of the following, if any, posed challenges to your child's education and/or overall wellbeing? (due to the pandemic).

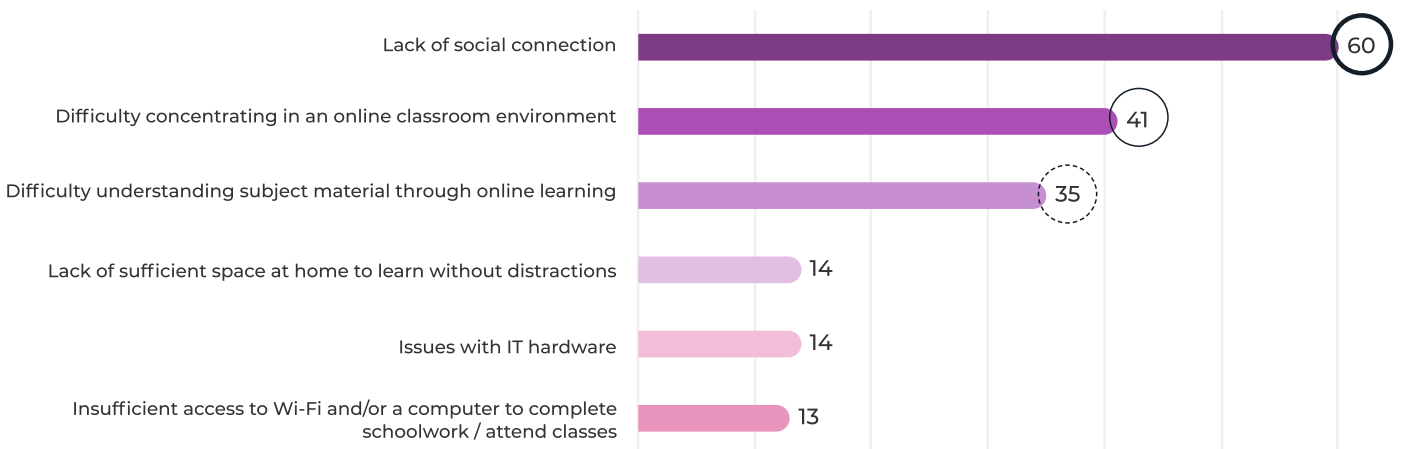


80% of children say they faced challenges during the pandemic, sharing the same top three challenges as their parents believe them to have faced.



Challenges during the pandemic (%)

Q49: We'd like to know how you think the COVID-19 pandemic impacted your experience in the last school year. Did you have any of these experiences?



Lack of social connection

62%

of girls experienced a greater lack of social connection than boys (59%).

63%

of 16–18-year-olds found the lack of social connection more challenging than 10–12-year-olds (59%) and 13–15-year-olds (60%).

Difficulty concentrating in an online classroom environment

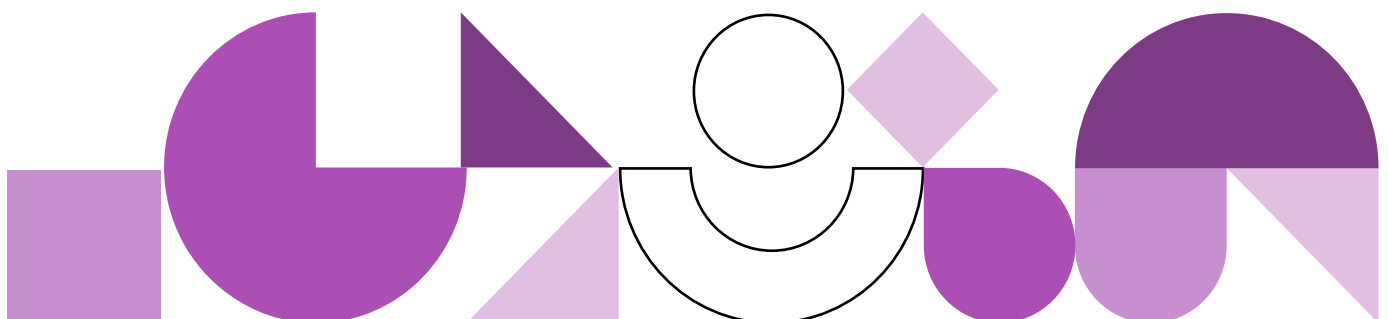
43%

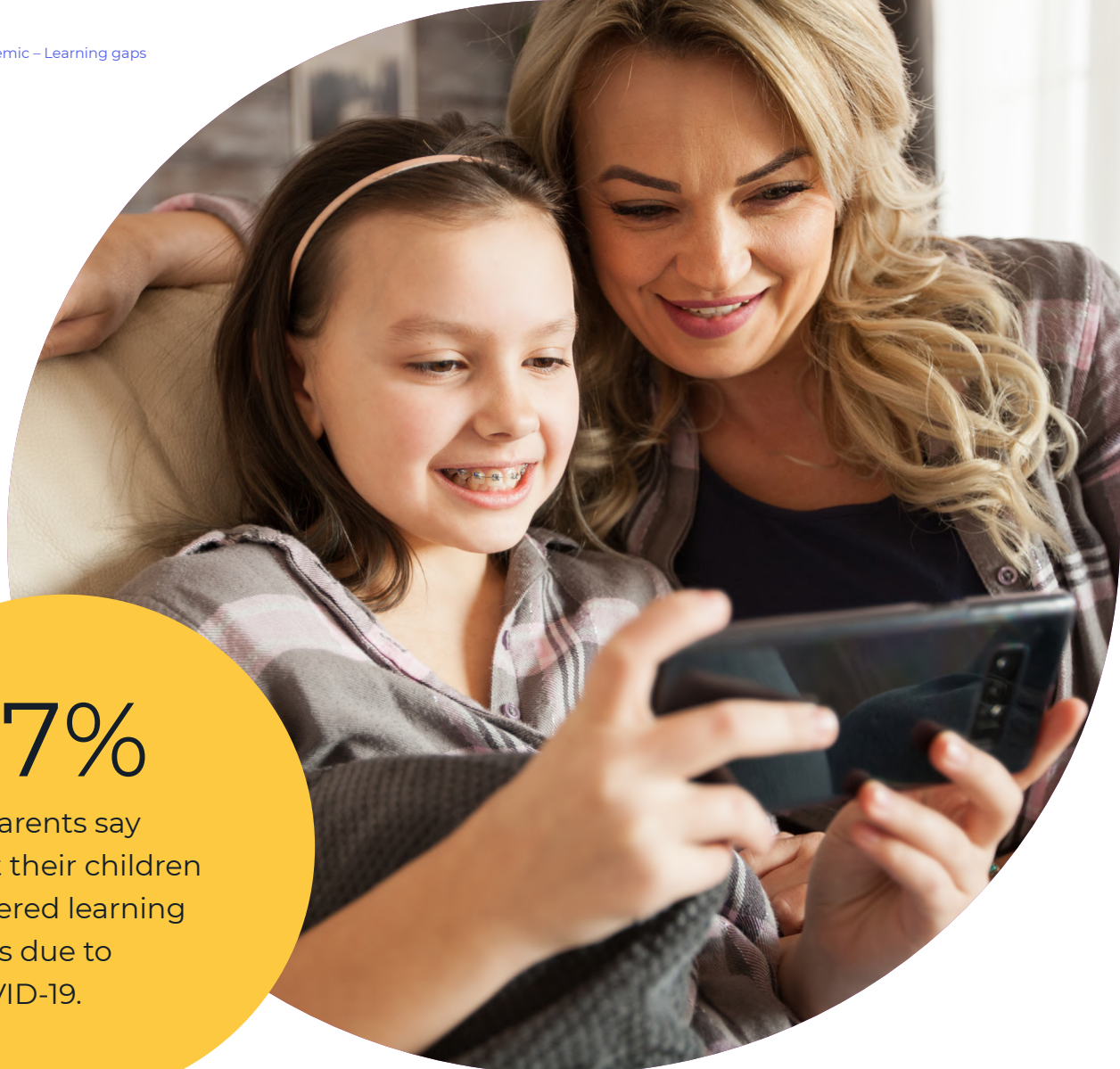
of 13–15-year-olds found it more challenging to concentrate in an online classroom environment than 10–12-year-olds (39%).

Difficulty understanding subject material online

37%

of 13–15-year-olds also found it harder to understand than 10–12-year-olds (33%).





57%

of parents say that their children suffered learning gaps due to COVID-19.

37%

13–15-year-olds had the most learning gaps in two or more subjects.

35%

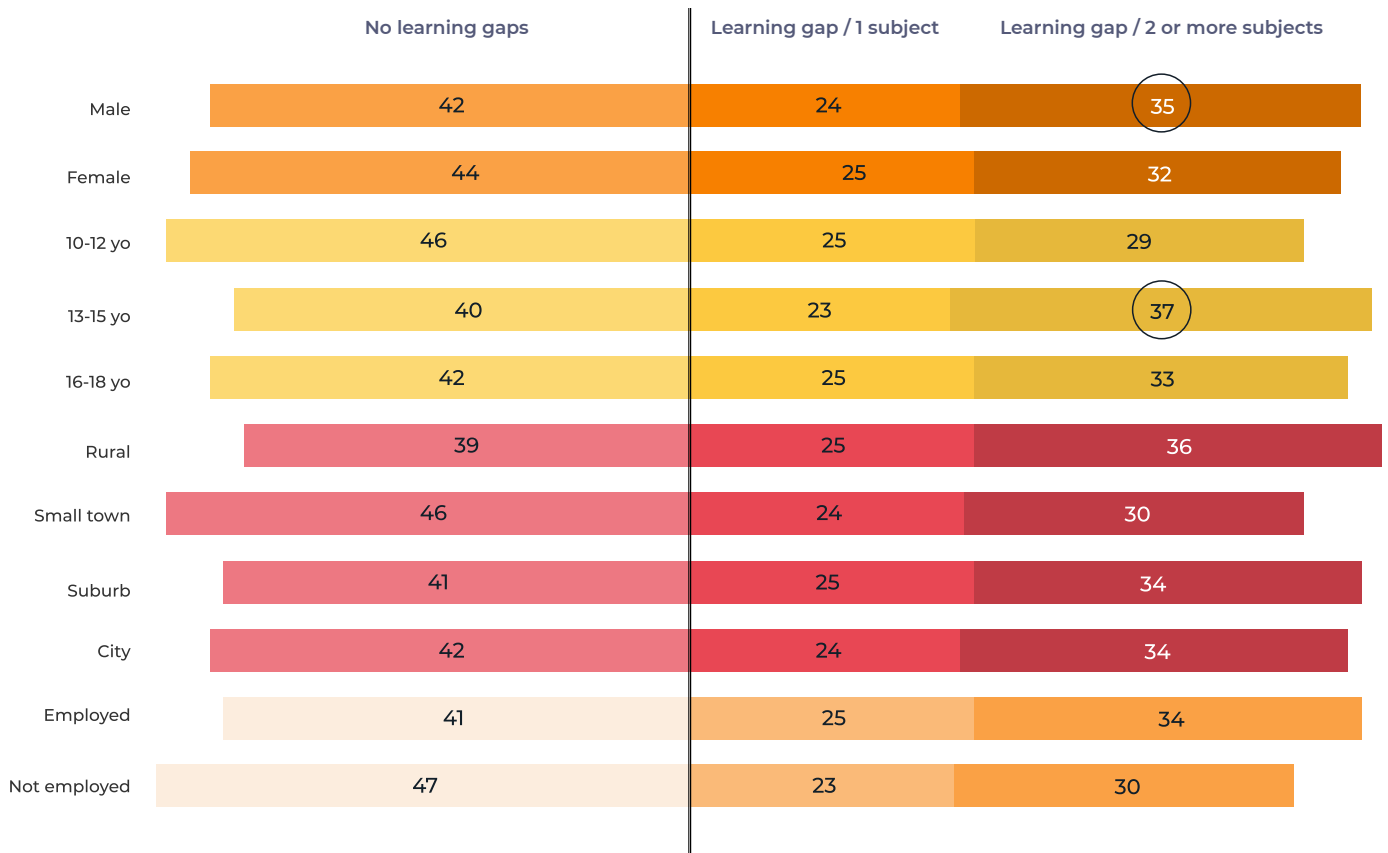
of boys suffered more learning gaps than girls (32%) in two or more subjects.

56%

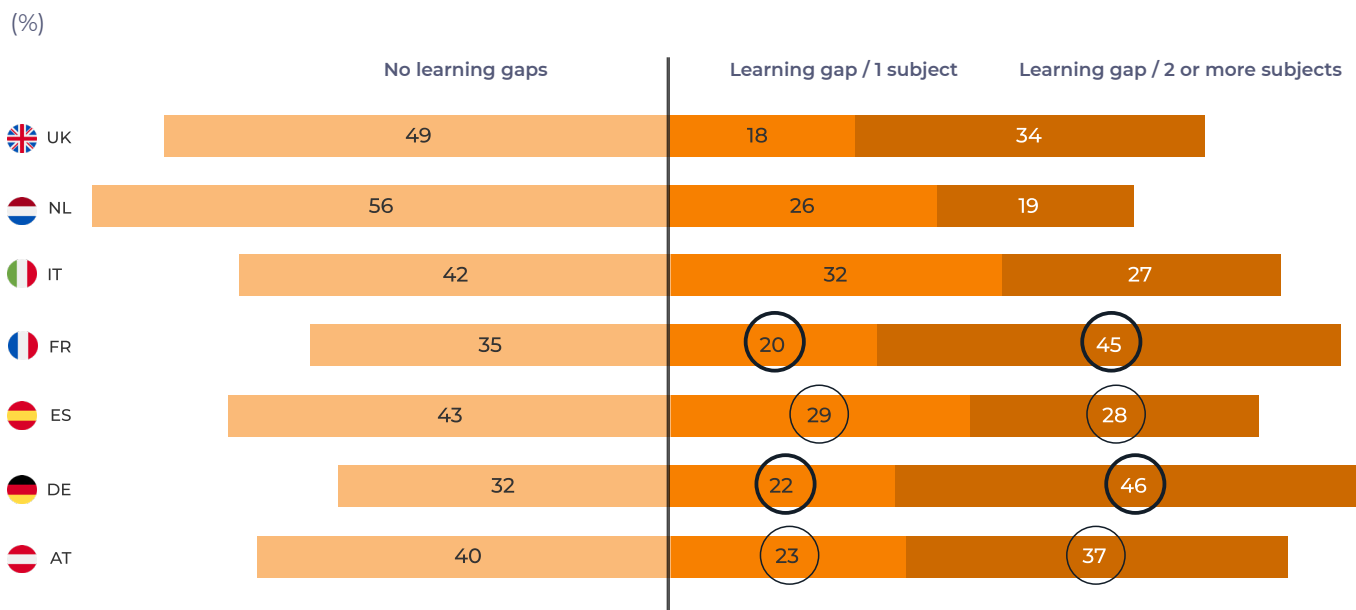
of students in the Netherlands claimed they experienced no learning gaps, followed by 49% in the UK (better than average).

Learning gaps – school subjects (%)

Q16: Did your child experience any learning gaps due to the pandemic?



68% of students in Germany and 65% in France experienced the most learning gaps in one or more subjects, followed by Austria (60%), Italy (59%) and Spain (57%).



Overall n=6285
 Male n=3279 | Female n=2992
 10-12 n=2002 | 13-15 n=2234 | 16-18 n=2029
 Rural n=1321 | Small town n=2381 | Suburb n=1083 | City n=1481
 Employed n=4824 | Not employed n=1460

UK n=1001 | NL n=1001
 IT n=1001 | FR n=1005
 ES n=1012 | DE n=1000
 AT n=265

○ 1 Greatest significance
 ○ 2 Second place significance
 ○ 3 Third place significance

57%

10–12-year-olds claim to have the fewest gaps (57% had no learning gaps).

27%

of boys said they suffered more gaps in 2 or more subjects than girls (24%).

58%

of children in the Netherlands claimed to have experienced no learning gaps, similar to their parents.

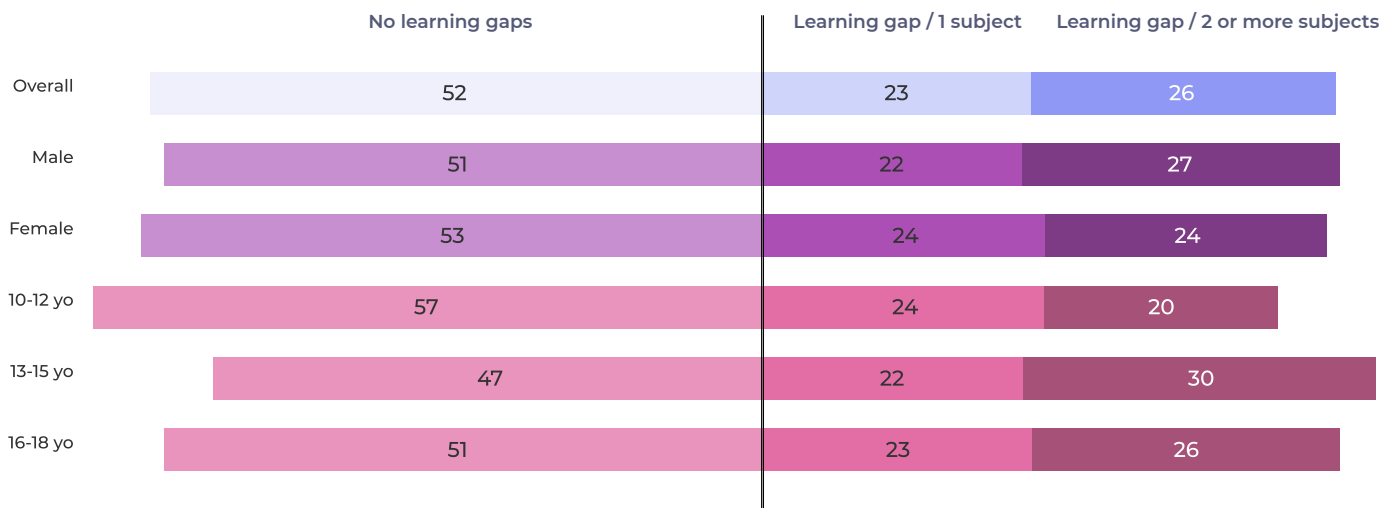
48%

of children say they experienced learning gaps.



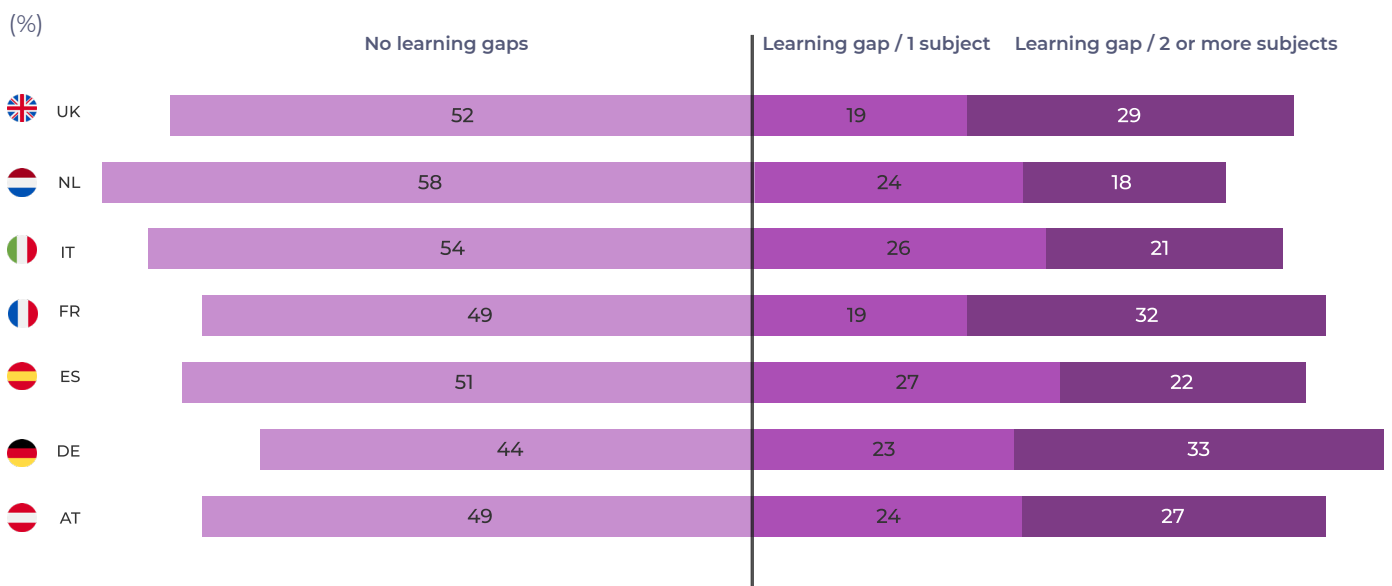
Learning gaps – school subjects (%)

Q50: Did you fall behind in any subjects at school because of the pandemic?



58% of students in the Netherlands experienced the fewest gaps in Europe (Europe average = 52%).

Students in Germany claimed to have the most learning gaps in 2 or more subjects (33%)*.



*more than in the Netherlands, Italy, the UK and Spain.

Overall n=6285

Children n=5767

UK n=889 | NL n=930 | IT n=974 | FR n=899 | ES n=952 | DE n=886 | AT n=237

Most learning gaps occurred in Maths (30%) followed by English (18%).

31%

of girls experienced more of a learning gap in Maths.

20%

of boys experienced more of a learning gap in English, according to parents.

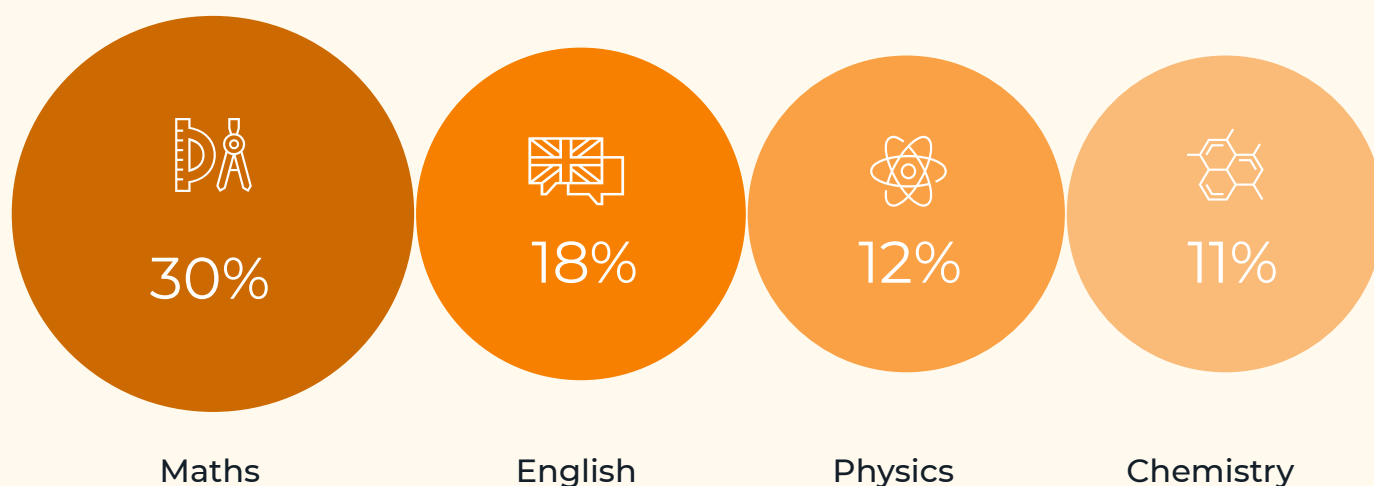
13-15

year-olds suffered across all main 4 subjects (Maths, English, Physics and Chemistry).

Learning gap – by subject

Q16: Please select any of the subjects below where your child experienced any learning gaps during the last school year (2020–2021).

Top 4 subjects. All other subjects were significantly lower at 9% or less

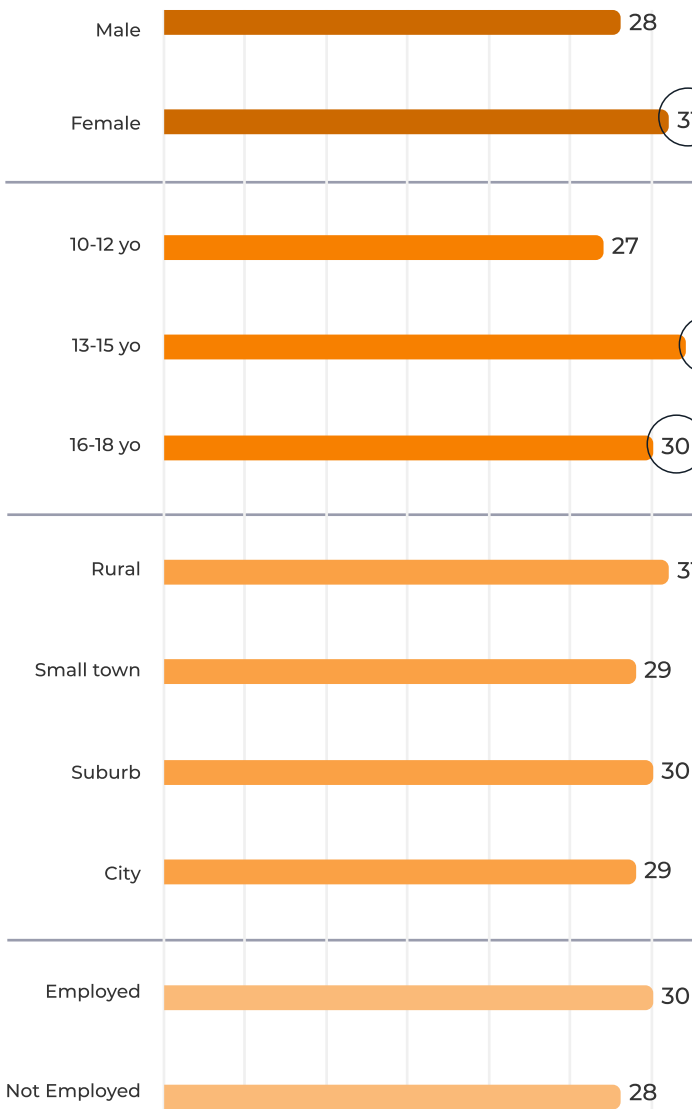




Learning gaps experienced in Maths

Girls and 13-15-year-olds were more likely to experience a learning gap in Maths.

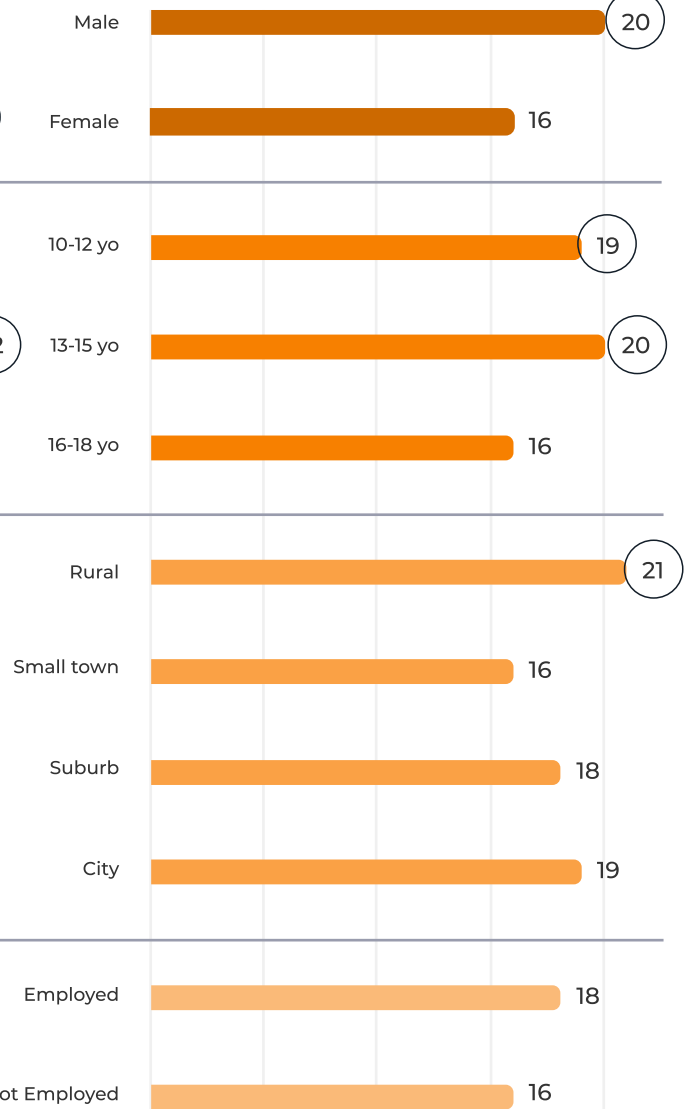
(% Yes)



Learning gaps experienced in English

Boys, 10-15-year-olds and those in rural areas followed by cities were more likely to experience a learning gap in English.

(% Yes)



Physics and Chemistry gaps were felt equally across all segments.

Overall n=6285
 Male n=3279 | Female n=2992
 10-12 n=2002 | 13-15 n=2234 | 16-18 n=2029
 Rural n=1321 | Small town n=2381 | Suburb n=1083 | City n=1481
 Employed n=4824 | Not employed n=1460

○ 1 Greatest significance
 ○ 2 Second place significance
 ○ 3 Third place significance

27% of children claim they are falling behind in Maths and 14% in English.

52%

claimed they experienced no learning gaps.

10%

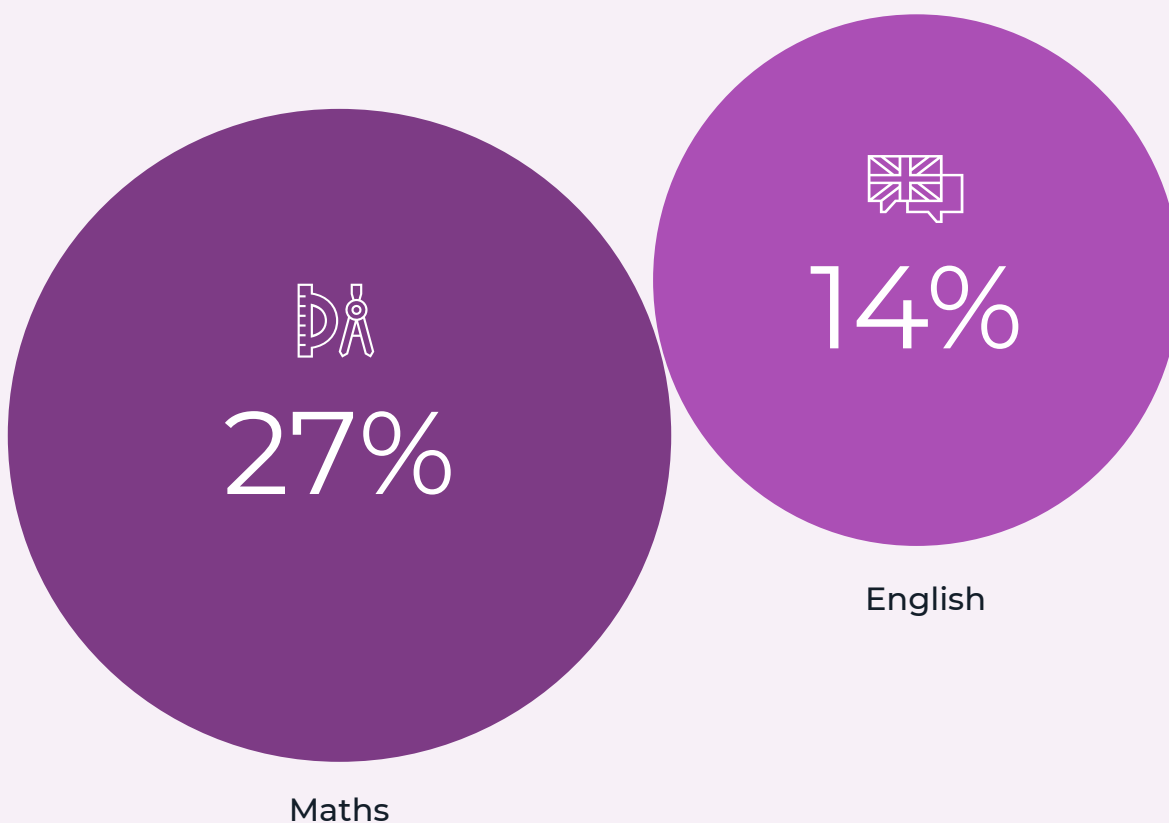
All other subjects fell under 10%.

16%

of boys report a learning gap compared to 12% of girls.

Learning gap – by subject

Q50: Did you fall behind in any of these subjects at school because of the pandemic?

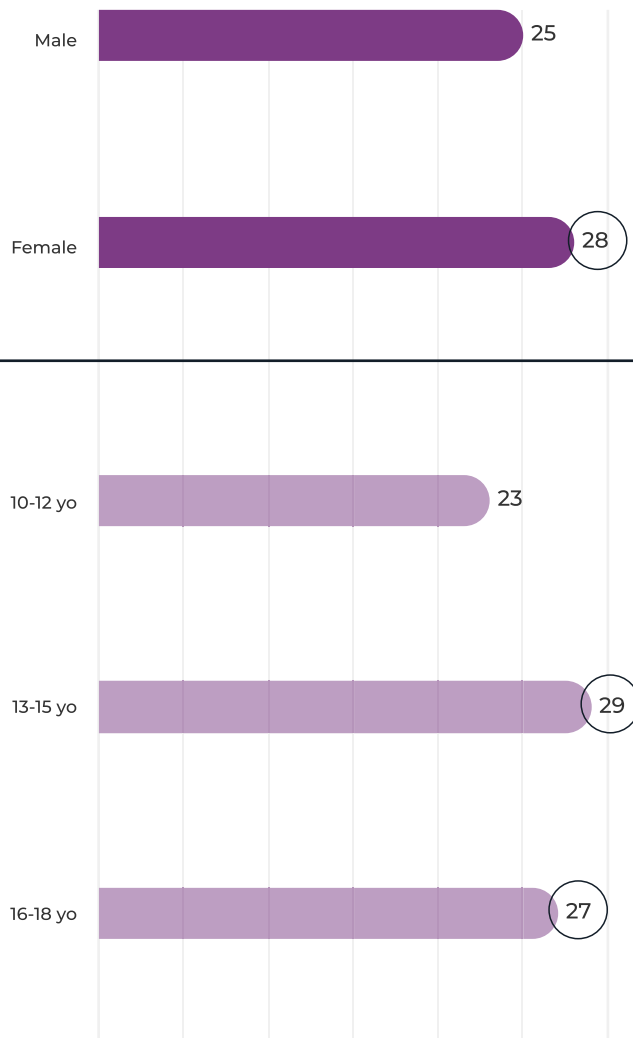




Learning gaps experienced in Maths

Girls and 13–18-year-olds were more likely to experience a learning gap in Maths.

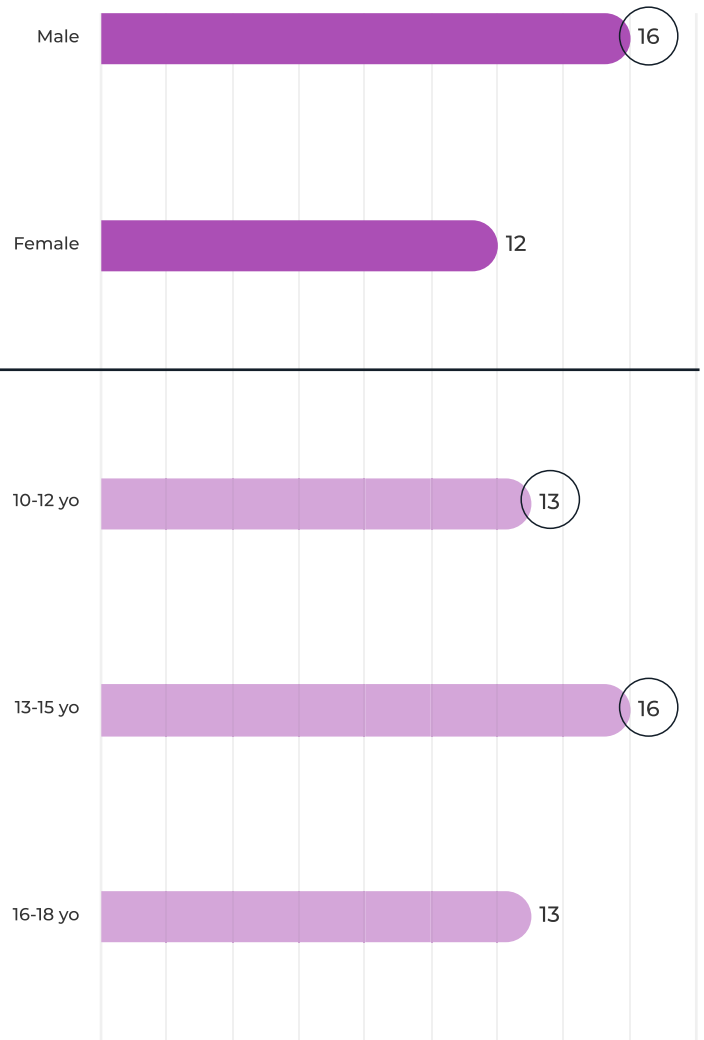
(% Yes)



Learning gaps experienced in English

Boys and 10–15-year-olds were more likely to experience a learning gap in English.

(% Yes)



Overall n=6285
Children n=5767

UK n=889 | NL n=930 | IT n=974 | FR n=899 | ES n=952 | DE n=886 | AT n=237

- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance

Germany, followed by Austria, showed the most learning gaps across all surveyed subjects.



Austria (39%) and Germany (37%) experienced the most gaps in Maths.

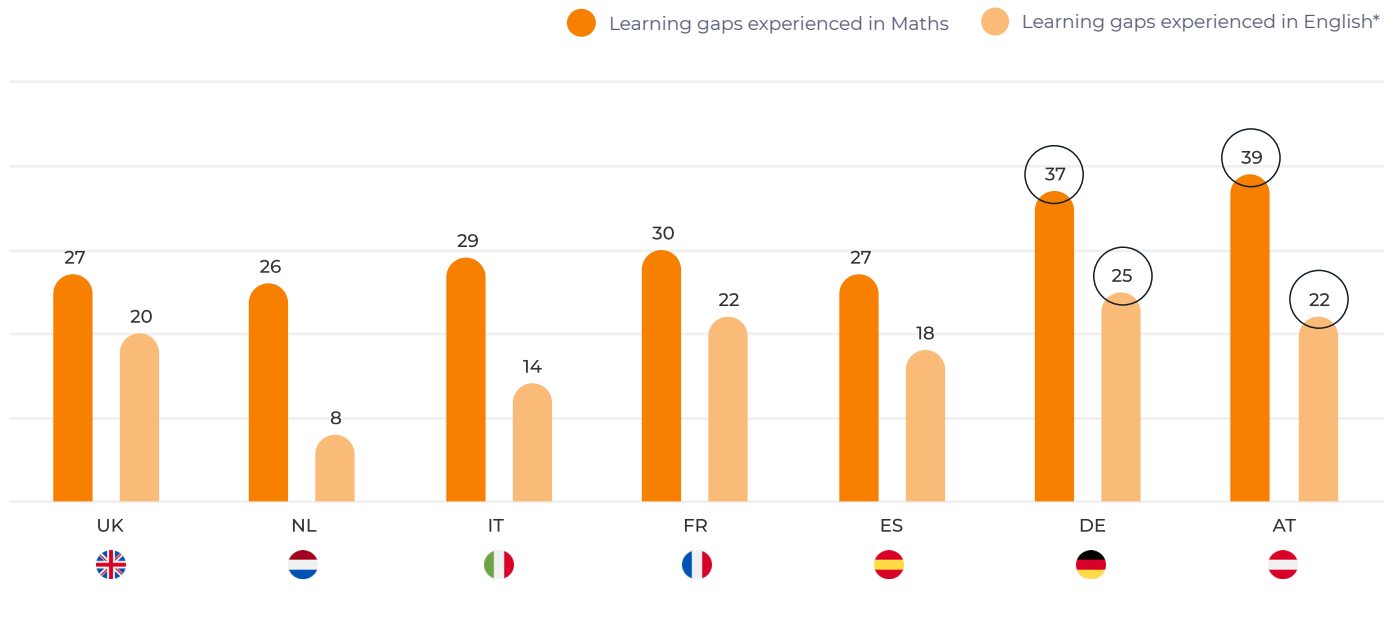


Germany (25%), followed by Austria (22%) and France (22%)* experienced the most gaps in English.

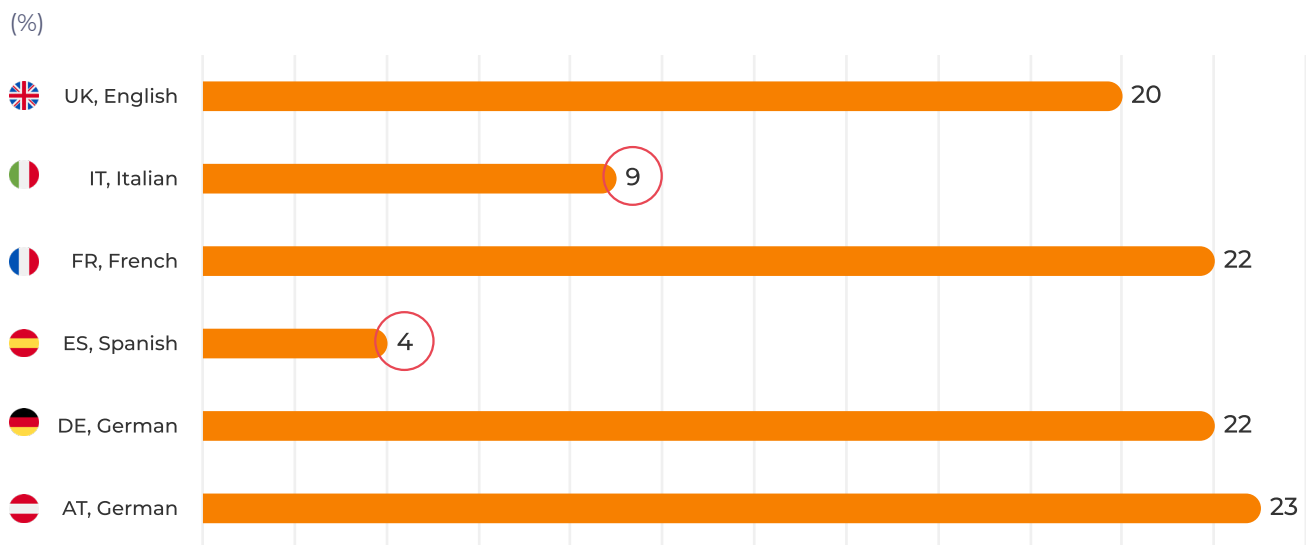
Learning gap – by subject (%)

Q16: Please select any of the subjects below where your child experienced any learning gaps during the last school year (2020–2021).

Top 4 subjects. All other subjects were significantly lower at 9% or less.



Looking at native languages across countries, all experienced similar learning gaps (approx. 20%) except Spain (only 4%) and Italy (only 9%).



We did not ask about Dutch in the survey

**foreign language except in the UK*

Overall n= 6285
 UK n=1001 | NL n=1001 | IT n=1001 | FR n=1005 | ES n=1012 | DE n=1000 | AT n=265

- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance
- Greatest lowest significance



Students in Germany say they had the most gaps in Maths (30%).



30%

of students in Germany say they had more gaps in Maths compared with students in France, Italy and Spain (25%).



6%

The Netherlands had the fewest gaps in English.



8%

Italy (8%) and Spain (4%) had the fewest gaps in their native language.

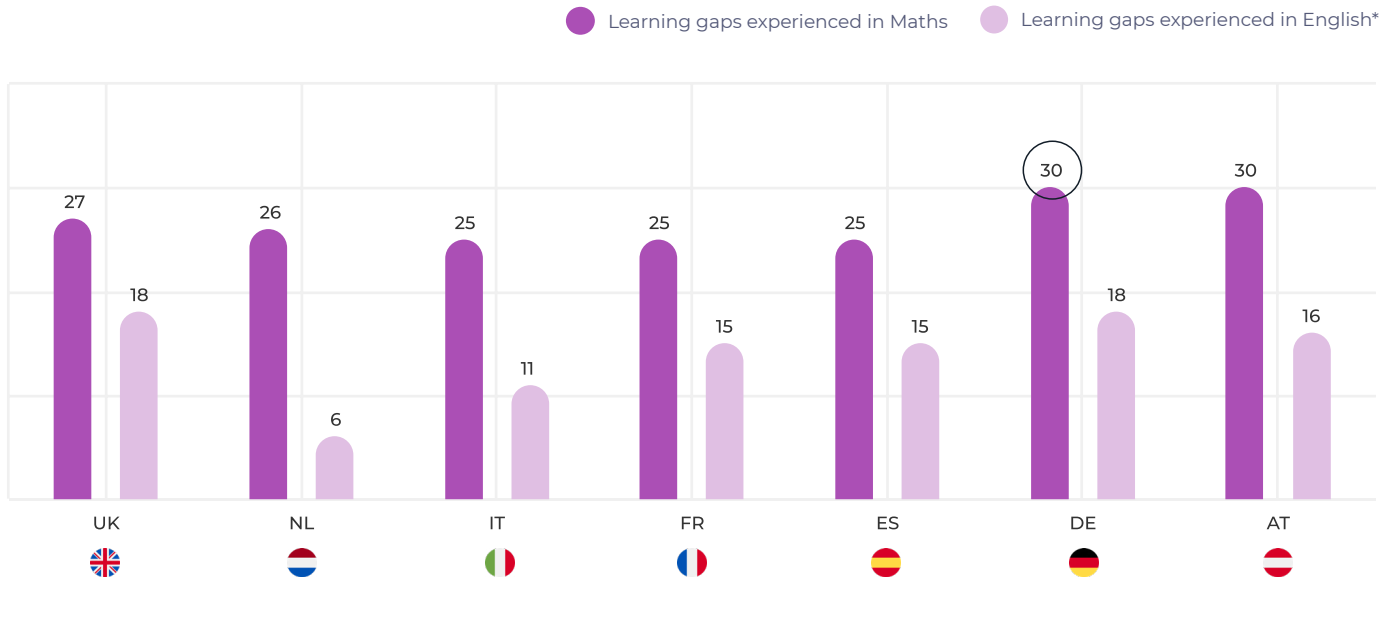


4%

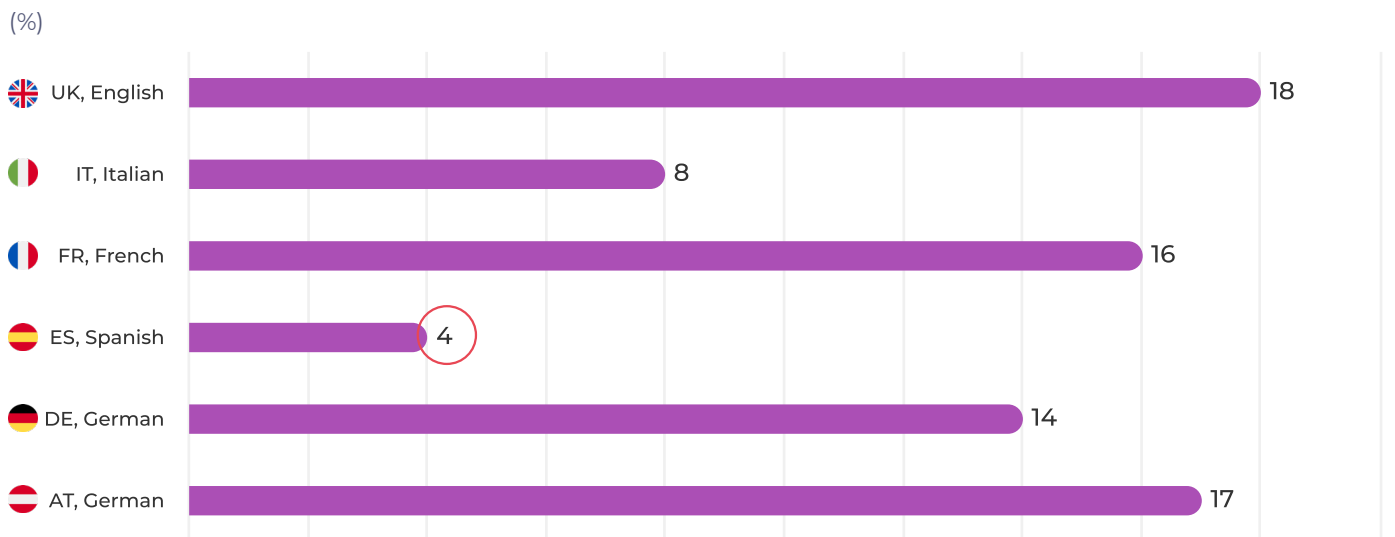
Learning gap – by subject (%)

Q51 - Do you think you'll catch up this school year (2021–2022)?

Top 4 subjects. All other subjects were significantly lower at 9% or less.



Looking at native languages across countries, all experienced similar learning gaps (approx. 20%) except Spain (only 4%) and Italy (only 8%).



We did not ask about Dutch in the survey

*foreign language except in the UK

Overall n=6285
 Children n=5767
 UK n=889 | NL n=930 | IT n=974 | FR n=899 | ES n=952 | DE n=886 | AT n=237

- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance
- Greatest lowest significance

53% of parents believe learning gaps will or might continue this school year.

41%

of parents do not expect the learning gap to continue this school year.

53%

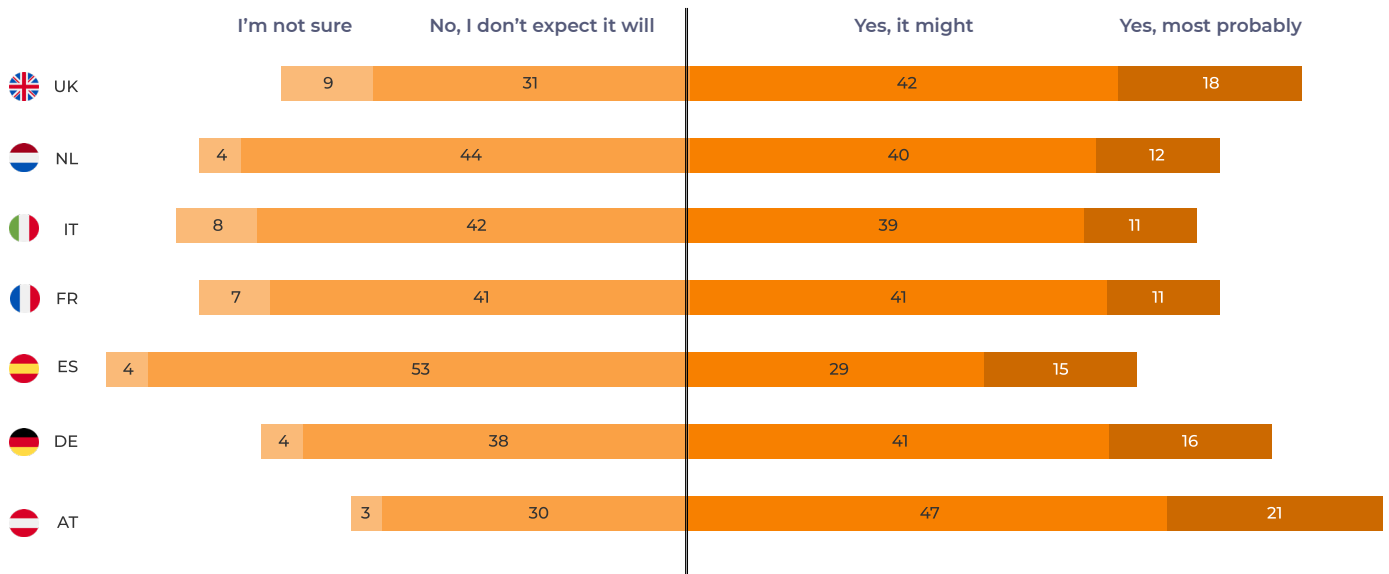
Parents in Spain are the most confident the learning gap will not continue .

16-18

year-old’s parents are most optimistic: 44% don’t expect the learning gap to continue.

Learning gaps – ongoing (%)

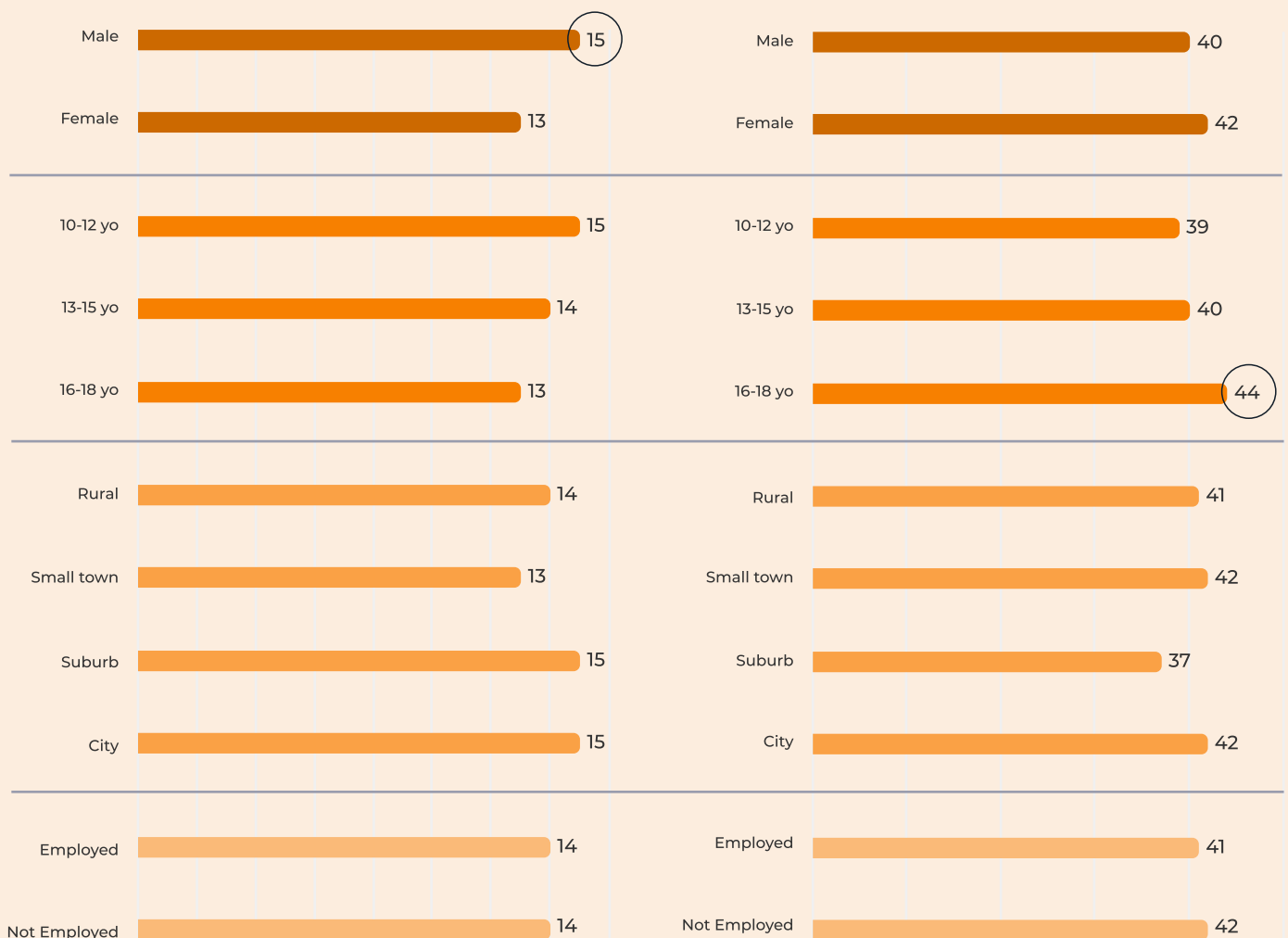
Q17: Do you think the learning gap will continue this school year (2021–2022)?



15% of boys' parents expect the learning gaps to continue more than girls' parents (12%).
 44% of parents of 16–18-year-olds expect learning gaps to end.

Yes, [the learning gap] most probably [will continue] (%)

No, I don't expect it [the learning gap] will [continue] (%)



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 Male n=3279 | Female n=2992
 10-12 n=2002 | 13-15 n=2234 | 16-18 n=2029
 Rural n=1321 | Small town n=2381 | Suburb n=1083 | City n=1481
 Employed n=4824 | Not employed n=1460

○ 1 Greatest significance
 ○ 2 Second place significance
 ○ 3 Third place significance

35% of children believe they most probably will catch up this year and are more pessimistic than parents (41% believe the learning gap will not continue).



Children are most optimistic about catching up in Italy (45%) and Spain (51%).



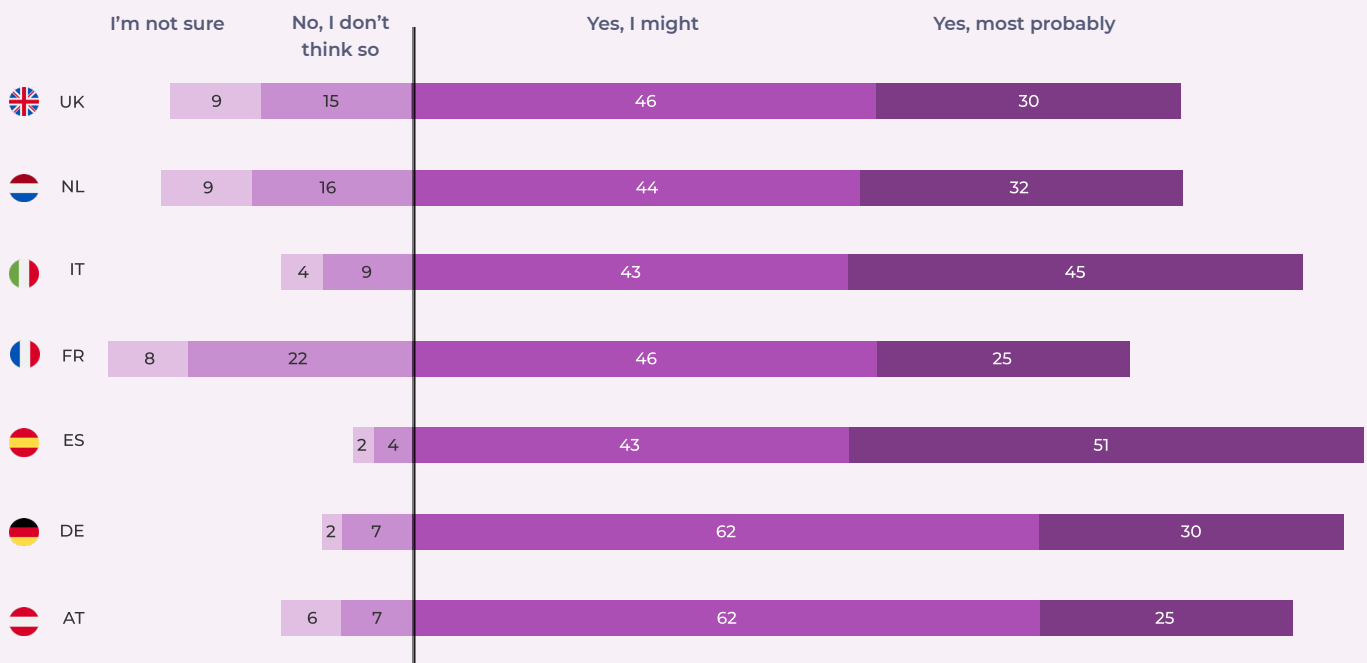
Boys (37%) are more confident than girls (33%) that they will catch up.



Children who receive tutoring (46%) are more likely to believe they will catch up than those who don't (31%).

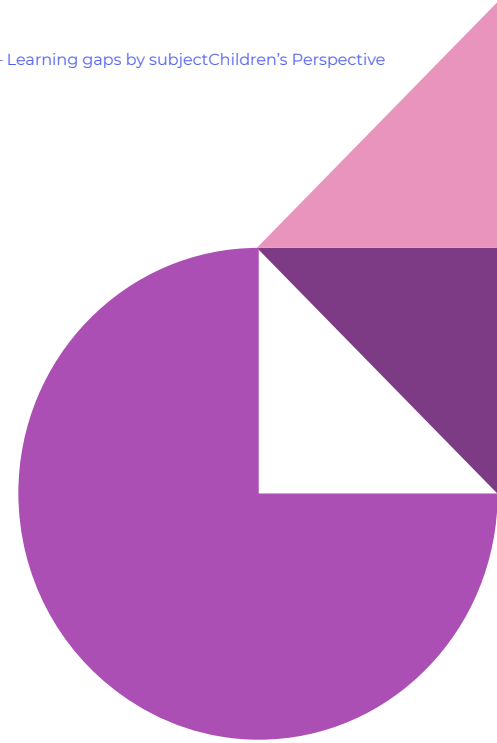
Learning gaps – ongoing (%)

Q51: Do you think you'll catch up this school year (2021–2022)?



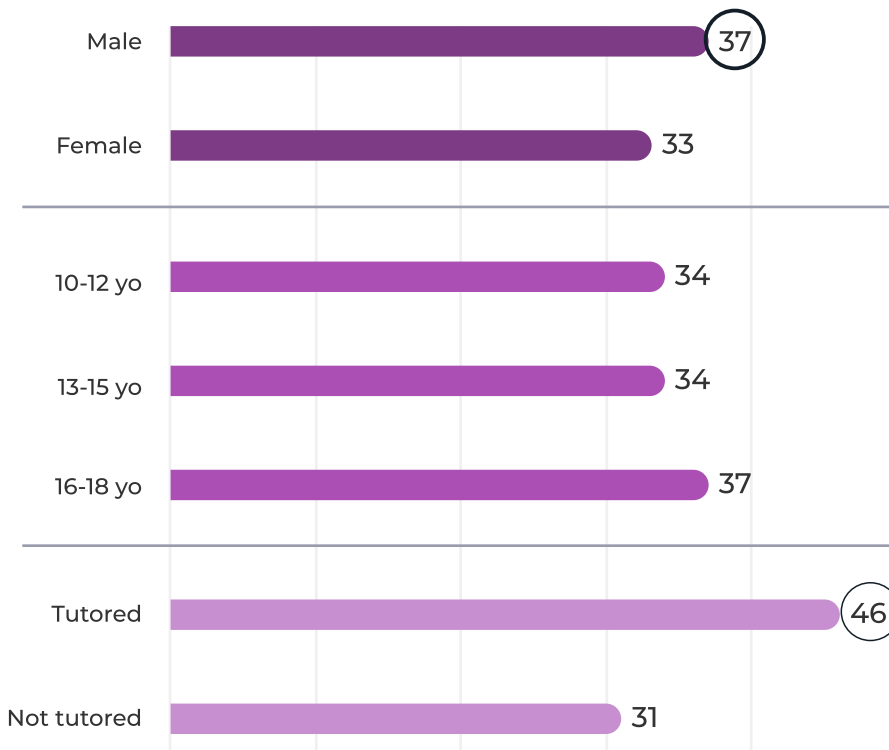
Boys are more confident than girls that they will catch up this school year.

16–18 year-olds are least confident that they will catch up.



Boys vs girls and tutored vs not-tutored children are more confident they will catch up (%)

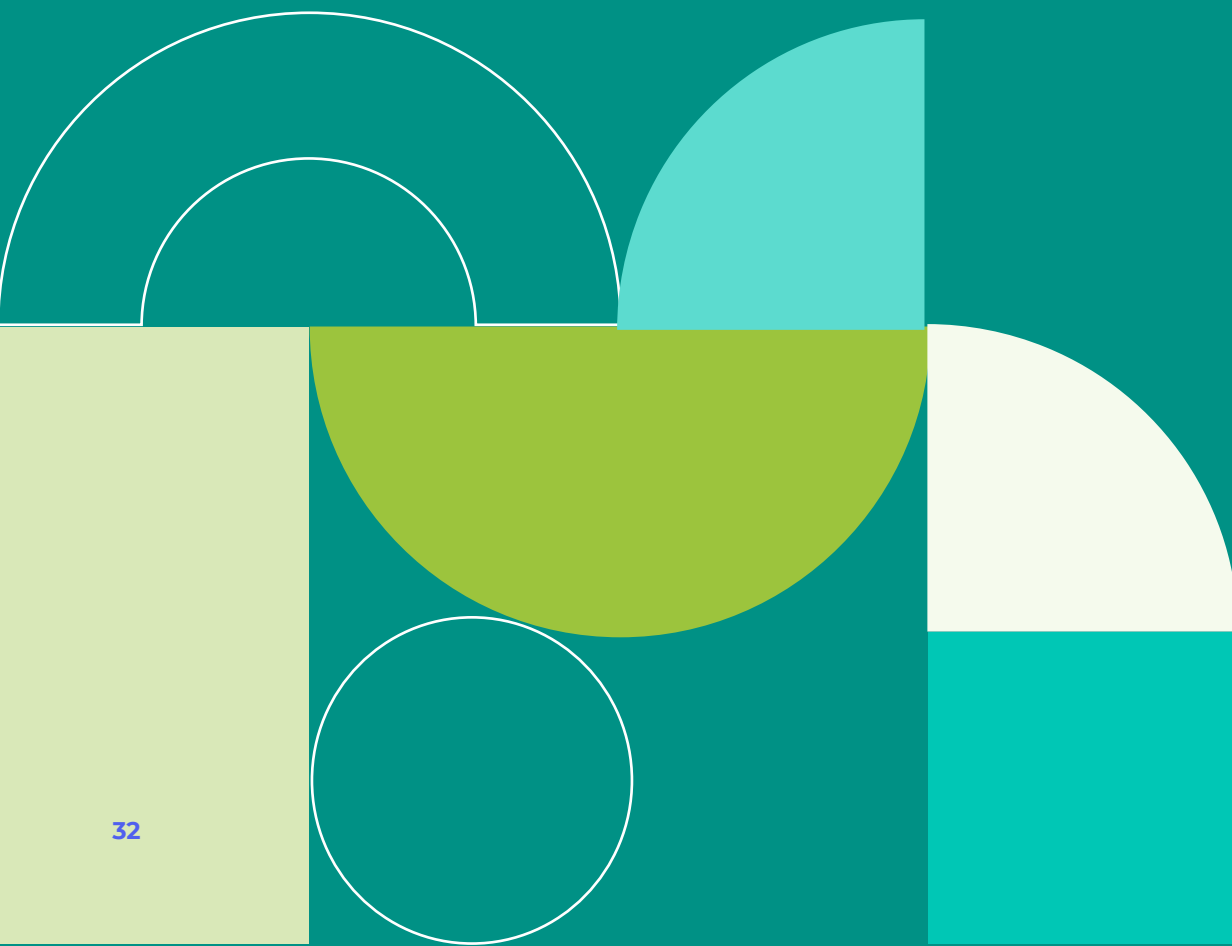
Yes, most probably [I will catch up this school year].



Children n=5767
 Children who received tutoring n=323
 Children who did not receive tutoring n=653

○ 1 Greatest significance
 ○ 2 Second place significance
 ○ 3 Third place significance

Wellbeing Indices



Calculating Wellbeing Indices

Parental Wellbeing Index
 Children's Educational Wellbeing Index
 (parents' view and child's view)

Wellbeing Indices; Weighted average – index to 100

Parental Wellbeing Index

Defines the degree to which parents felt positive about themselves in relation to their children's education.

Calculated on 6 experiences of being a parent, where 1 = Never true & 7 = Always true.

Q6: As a parent, I...

..... was able to help my child with their schoolwork
 ... found it difficult to be a supportive parent*
 ... found it frustrating to interact with my child when it came to schoolwork*
 ... felt confident in my child's learning progress
 ... felt informed on how my child was doing at school
 ... found support to help my child with schoolwork (e.g., tutoring)

Children's Educational Wellbeing Index

Combines how children felt about their education from a parent's perspective, as well as from the child's own perspective.

Calculated on a 7-point scale from the child's perspective about their educational wellbeing, where 1 = Never and 7 = Always.

Q7: Thinking about your child and their education during the last school year (2020–2021), how would you rate the following? My child...

..... was motivated to learn
 ... could study without distraction
 ... found it easy to stick to a study routine
 ... developed greater self-confidence
 ... improved their grades
 ... received support for their schoolwork/homework
 ... felt comfortable interacting with other students and/or teachers
 ... was frustrated with school or homework*

... felt comfortable talking about their feelings to parents, teachers etc
 ... had time for hobbies/leisure activities after completing schoolwork
 ... was comfortable attending online classes

Calculated on a 7-point scale from the parent's perspective about their child's educational wellbeing, where 1 = Never & 7 = Always.

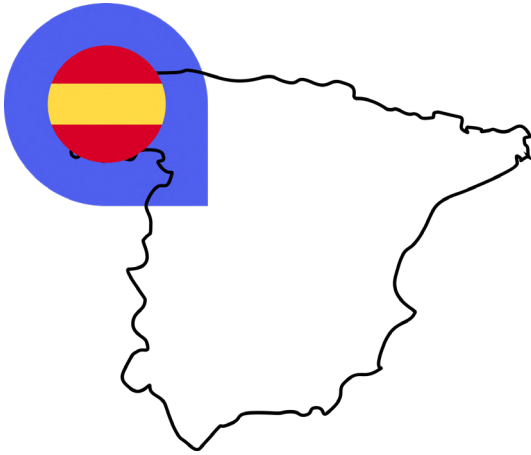
Q43: What do you think about the last school year (2020–2021)?

I was happy with my marks
 I felt frustrated with some subjects or teachers*
 I was motivated to do my schoolwork
 I felt confident at school
 I had time for my hobbies and friends
 I felt like I was under pressure*

*A reverse scale was used to accommodate negative attributes.

The Parental Wellbeing Index was **71** last school year

Spain had the highest Parental Wellbeing Index, while the UK, Germany and Austria all scored at the bottom.



Italy (73) and the Netherlands (72) had the second highest Parental Wellbeing Index.



The UK (69), Germany (68) and Austria (68) scored at the bottom.

Parents' rating of the Children's Educational Wellbeing Index sits 5 points higher than the children's.

01

Children rated their Educational Wellbeing Index (64) lower than their parents rated them (69). Four countries had an equally high difference: Spain, Austria, Germany and the UK; children rated themselves approx. 6 points lower than parents.

02

The Children's Wellbeing Index – from the parent's perspective, was highest among children who were tutored online (72).

03

Children were happiest with their grades (5.22) and leisure time (5.1).

04

Parents believe children had the hardest time with schoolwork (3.79).

Spain had the highest Parental Wellbeing Index, while the UK, Germany and Austria scored lowest.

Parental Wellbeing Index & Overall Index: 71

Q6: Thinking about your experience as a parent during the last school year (2020–2021), how would you rate the following?*

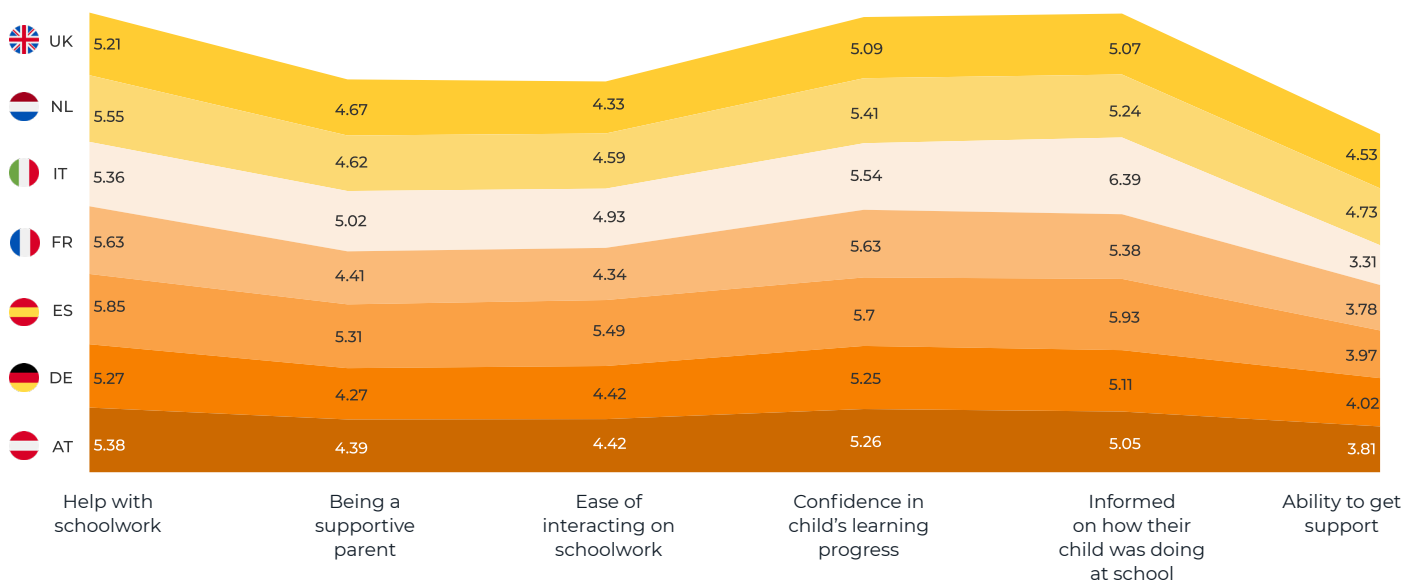


In Spain, parents were able to help most with schoolwork (5.85), while in the UK (5.21) and DE (5.27) parents were least able.

In Italy, parents felt most informed on how their children were doing at school (6.39) while in the UK parents felt the least informed (5.07).

The Netherlands and the UK found it easiest to get support to help their children on schoolwork (4.73 and 4.53, respectively) and Italy found it the hardest (3.3).

(index)



- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance

*Overall n=6285
UK n=1001 | NL n=1001 | IT n=1001 | FR n=1005 | ES n=1012 | DE n=1000 | AT n=265

Fathers scored higher than mothers across parental wellbeing attributes.

01

Fathers scored equal to or higher than mothers on all but one topic – interacting with their children on schoolwork (with 3.41 vs 3.14).

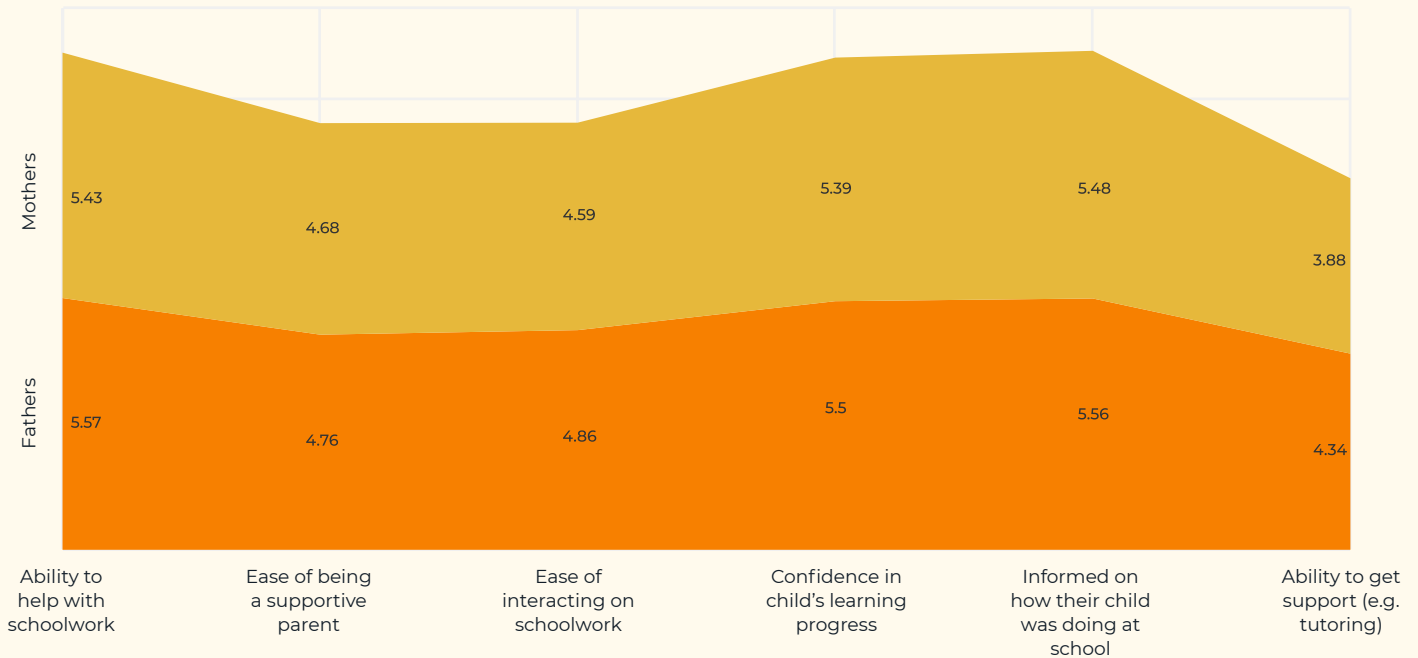
02

Mothers* and fathers* rated themselves differently across wellbeing topics.

Parental Educational Wellbeing Index & Attribute Mean Score

Q6: Thinking about your experience as a parent during the last school year (2020–2021), how would you rate the following?

(index)



*Female/male caregivers.

Mothers/female caregivers vs fathers/male caregivers

Overall, fathers/male caregivers had a significantly higher Wellbeing Index compared to mothers/female caregivers.



Mothers/female caregivers



Fathers/male caregivers

Ease of interacting with their child on schoolwork:

4.59 / 4.86

Ability to help children with schoolwork:

5.43 / 5.57

Ease of being a supportive parent:

4.68 / 4.76

Confidence in their child's learning progress:

5.39 / 5.5

Informed on how their child was doing at school:

5.48 / 5.56

Ability to get support (e.g tutoring):

3.88 / 4.34

N.B. Males who participated in this study were significantly more likely to be married and in higher income households vs women.

Parents' rating of the Children's Educational Wellbeing Index sits 5 points higher than the children's

Parents were asked to rate their children's behaviour and mindset with regards to the following topics, when thinking back to the last academic year. Children were asked to rate themselves against similar topics. The Children's Wellbeing Index was thus calculated from a "parents'" and "children's" perspective.

Children rated their Educational Wellbeing Index lower than their parents rated them (64 vs 69). Four countries had an equally high difference: Spain, Austria, Germany and the UK; children rated themselves approx. 6 points lower than parents.

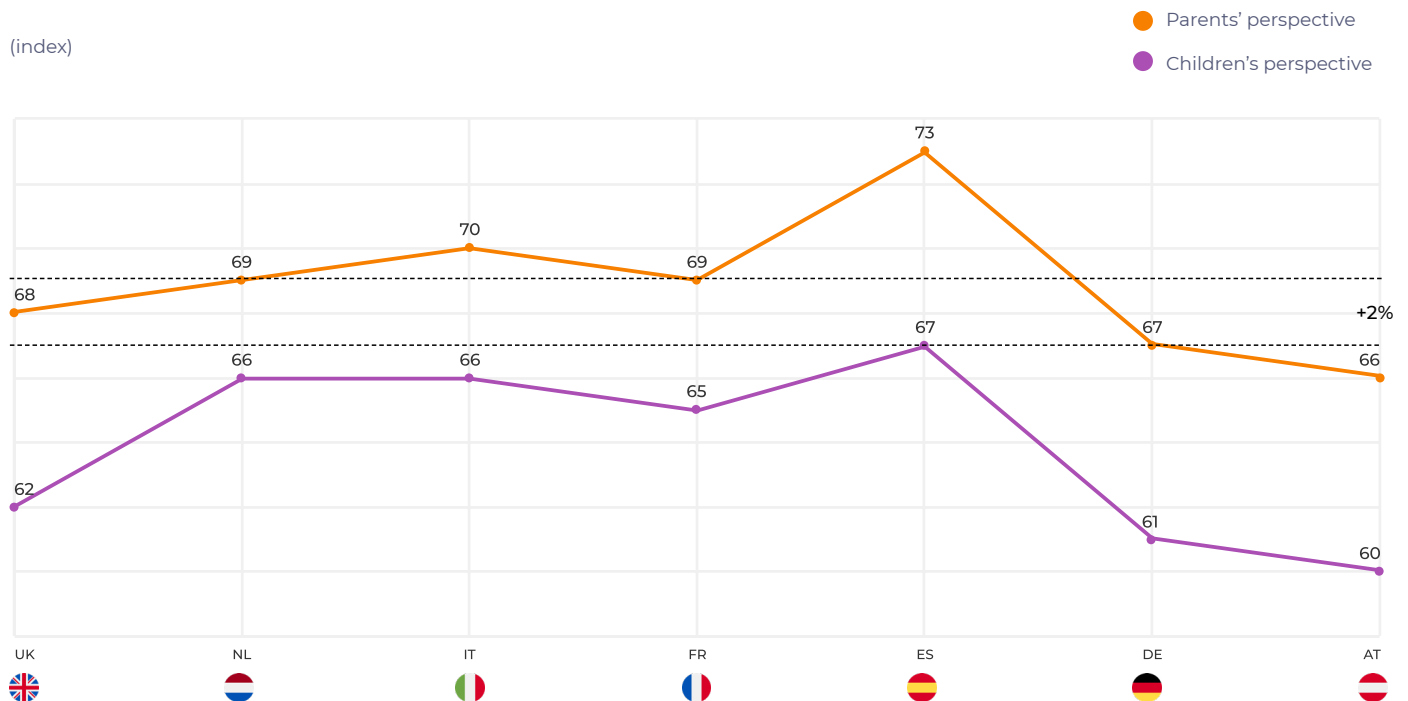
The smallest difference was in the Netherlands: Children rated themselves only 2 points lower (not significant).

Children's Wellbeing Index – parents' (69) and children's (64) perspective

Parents: Q7: Thinking about your child and their education during the last school year (2020–2021), how would you rate ...?

Children: Q43: What do you think about the last school year (2020–2021)?

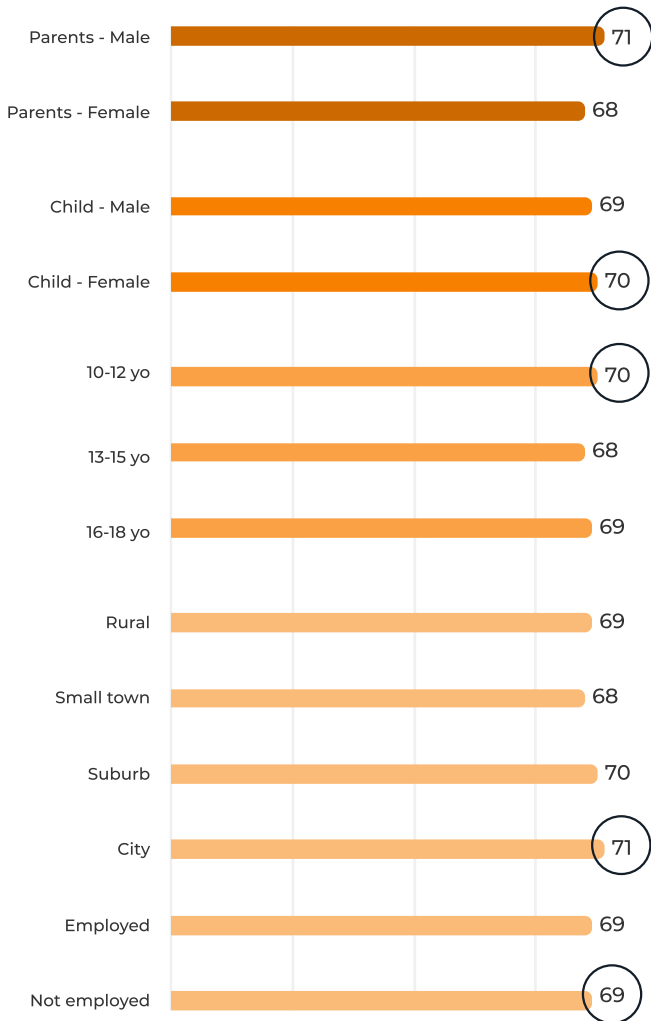
(index)



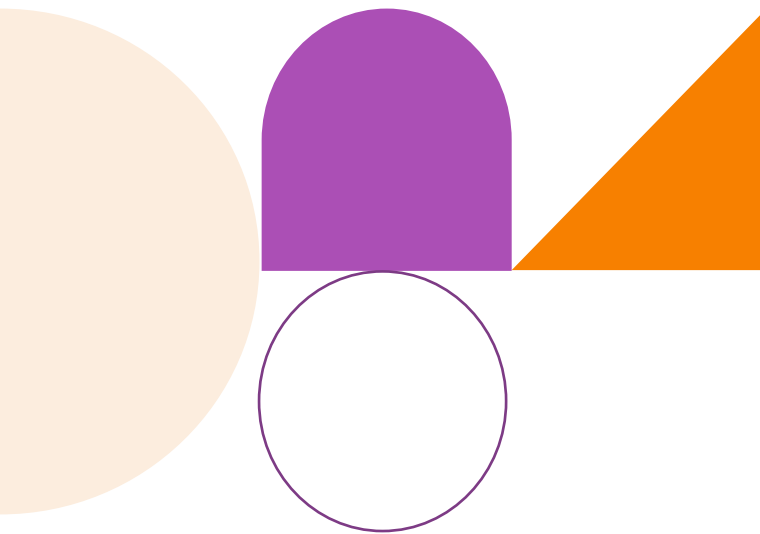
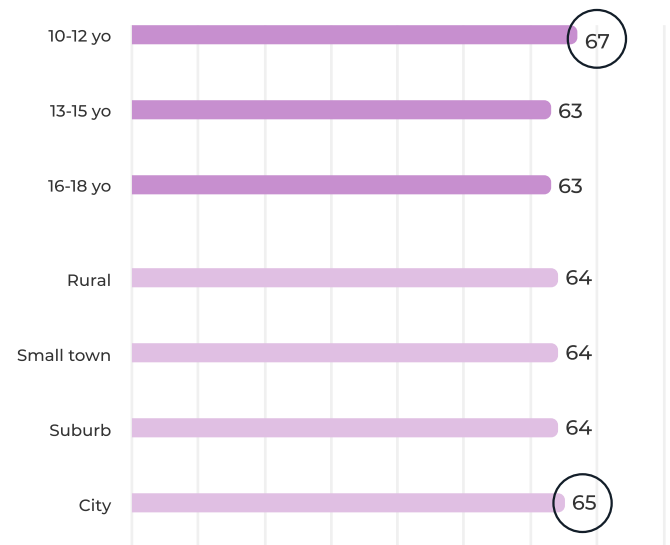
Differences in parental perspective based on respondent's gender, child's gender/age, residential area and respondent's employment status.

Fathers/male caregivers rated their child's Wellbeing Index higher than mothers/female caregivers. Girls were given a higher Wellbeing Index compared to boys, and 13–15-year-olds were given the lowest. Those living in cities rated their child's wellbeing higher than in other areas.

(index)



The child's perspective showed 10–12-year-olds and those living in cities to be higher.



- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance

Online tutoring evidenced a more favourable Wellbeing Index (**72%** and **63%**) as opposed to offline tutoring among (**70%** and **61%**) both parents and children.



Online tutoring



Offline tutoring

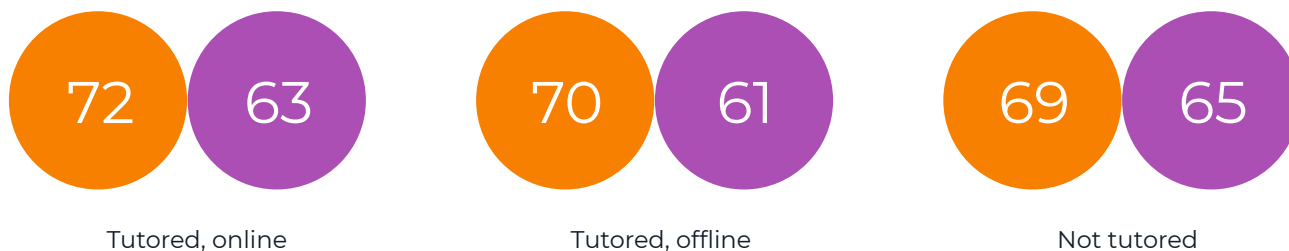
Children's Wellbeing Index – tutored vs not-tutored children

Parents: Thinking about your child and their education during the last school year (2020–2021), how would you rate ...?

Children: What do you think about the last school year (2020–2021)?

● Parent's perspective

● Children's perspective



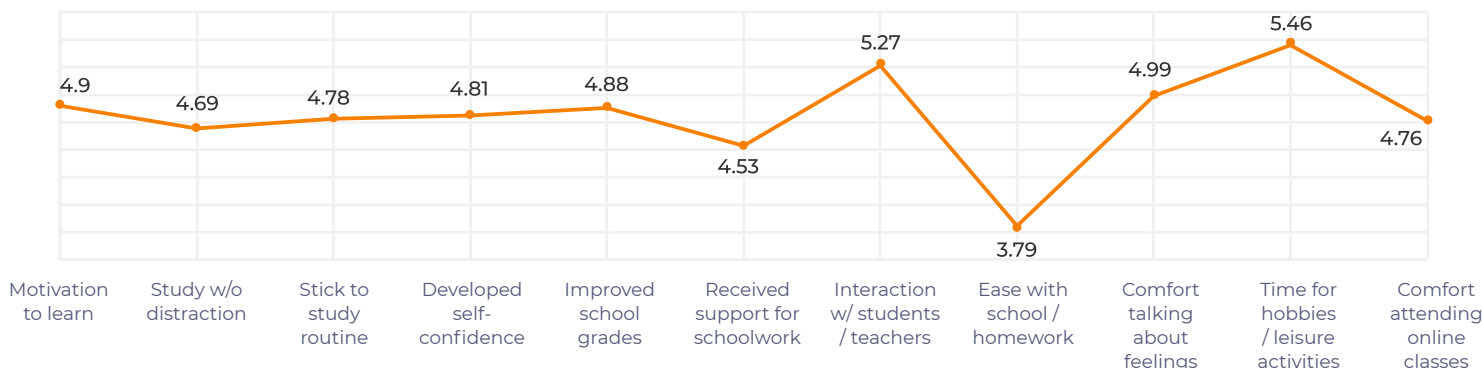
Online tutoring evidenced a more favourable Wellbeing Index as opposed to offline tutoring among both parents and children.

Parents (5.46) and children (5.1) agree there was enough time for hobbies/leisure last year.

Parents rate their children's experience – mean score

Q7: Parents: Thinking about your child and their education during the last school year (2020–2021), how would you rate ...? where 1 = Never true & 7 = Always true.

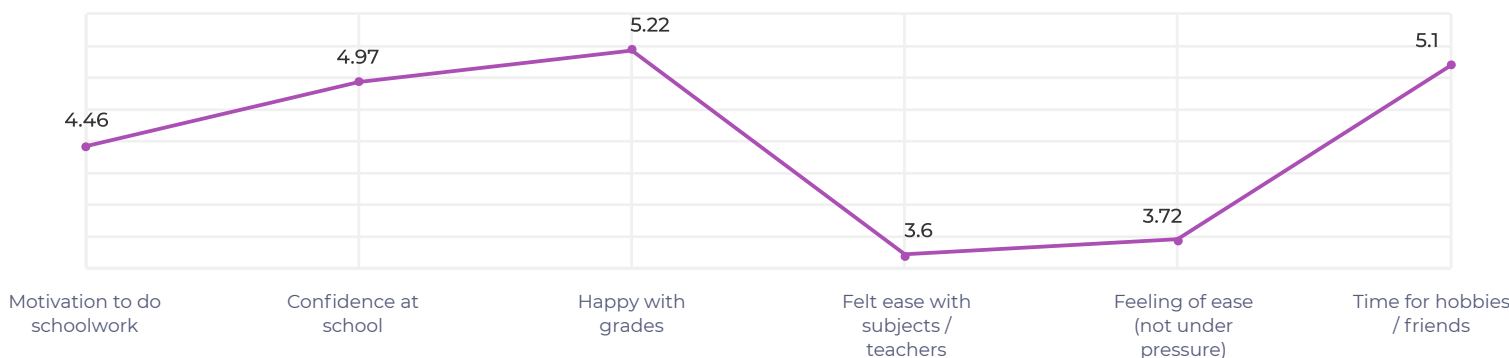
(index)



Children rate their experience – mean score

Q43: Children: What do you think about the last school year (2020–2021)?

(index)



Boys rated higher across every single aspect:

Happy with marks

♂ 5.30 / ♀ 5.17

Motivated to do schoolwork

♂ 4.68 / ♀ 4.34

Confident at school

♂ 5.18 / ♀ 4.87

Time for hobbies

♂ 5.23 / ♀ 5.04

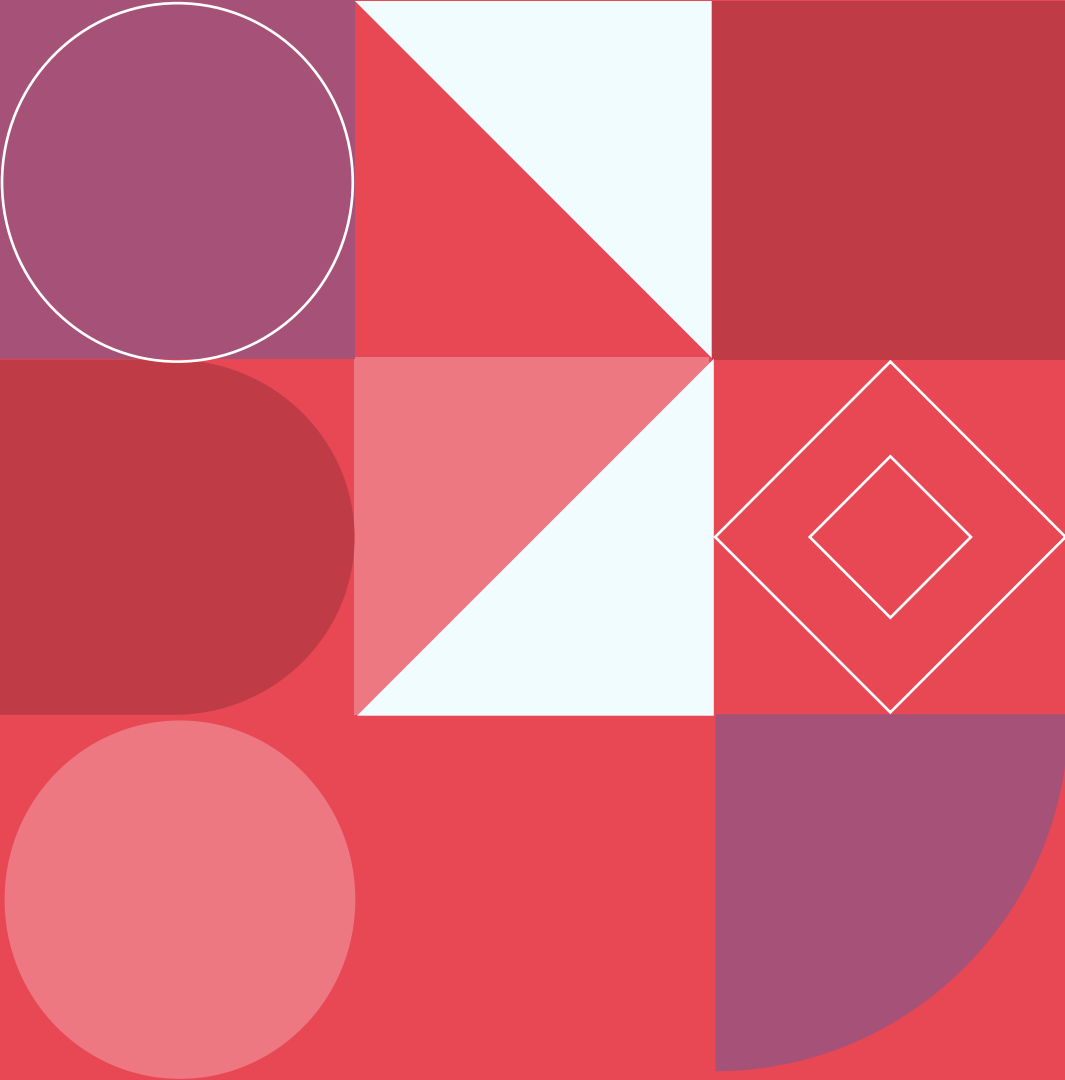
Ease with subjects/teachers

♂ 3.70 / ♀ 3.55

Feeling of ease

♂ 3.82 / ♀ 3.67

Overall n=6285 (parents)
Children n=5767



Parental Involvement Index

Calculating Index

Parental Involvement Index

Parental Involvement Index; Weighted average – index to 100

Parental Involvement Index shows how involved parents were with their children's education.

Calculated on a 5-point scale across aspects of parental involvement, where 1 = Not involved at all and 5 = Very Involved.

Q8: How involved were you in these aspects of your X-year-old's education during the last school year?

...I talked with other parents about school events

...I spent time working with my child on their homework

...I invested in home learning materials for my child (videos, books etc)

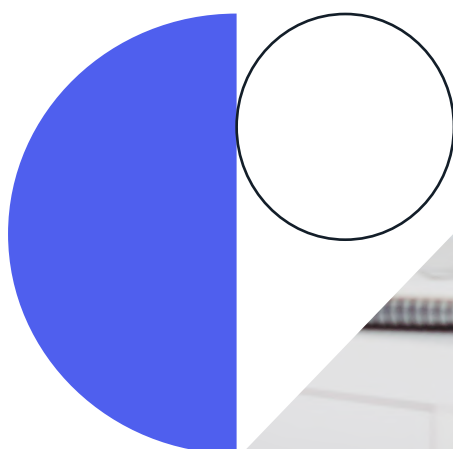
...I spent time working on creative activities with my child

...I talked to the teacher(s) about my child's relationship with their classmates

...I talked with my child's teacher(s) about learning difficulties

...I talked with my child about challenges they faced in school

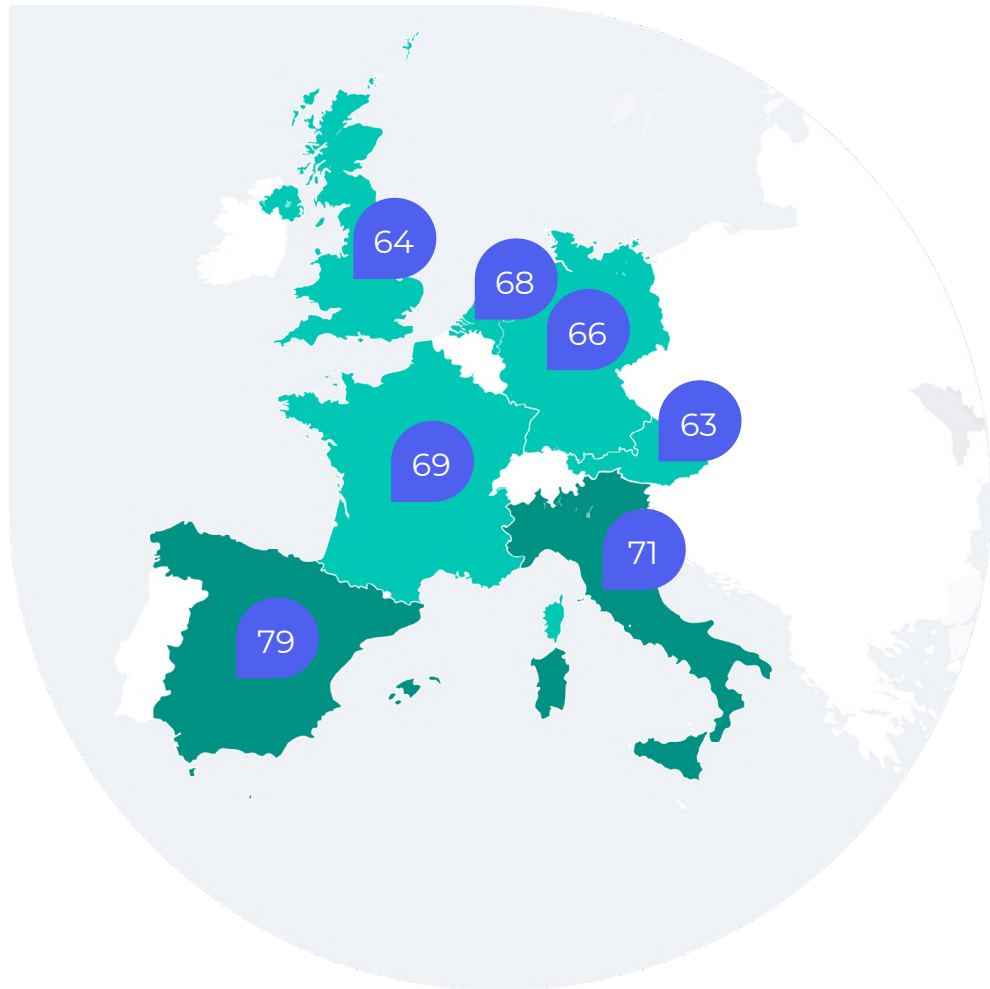
...I got regular updates on my child's marks



Last year's Parental Involvement Index was **69**

Parental Involvement Index was highest for children who received tutoring in line with findings from the Wellbeing Index.

- Parents whose children received tutoring had the highest Involvement Index. These parents were also more likely to get involved in other areas of their children's school experience
- Tutored children also received other support such as educational online videos
- Parents of 10–15-year-olds were more likely to get involved than parents of 16–18-year-olds and those in large cities



Spain was also rated highest on its Parental Involvement Index (similarly with Wellbeing Index).



Parents in Spain felt most involved (79), followed by in Italy (71).



France and the Netherlands were third on the Parental Involvement Index (with 69 and 68, respectively).



Parents in the UK and Austria felt the least involved in their child's education (with 64 and 63, respectively).

Parents were asked to rate how involved they were in their child’s education across different aspects in the last school year. The Parental Involvement Index was thus calculated.

Parental Involvement Index: 69

How involved were you in the following aspects* of your child’s education during the last school year?

*See the following page for full list

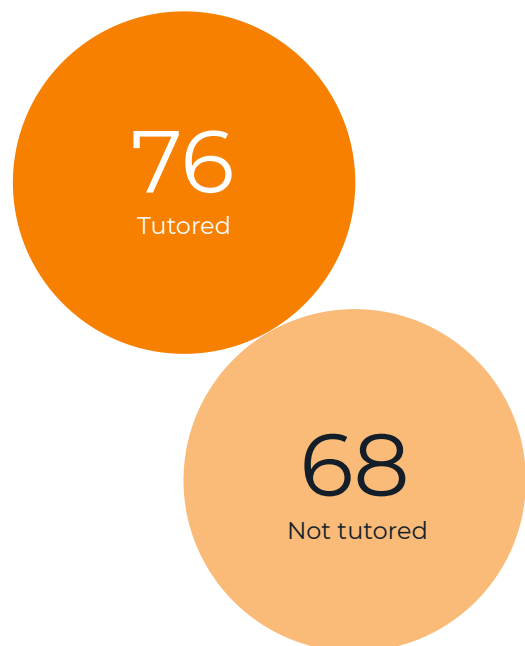
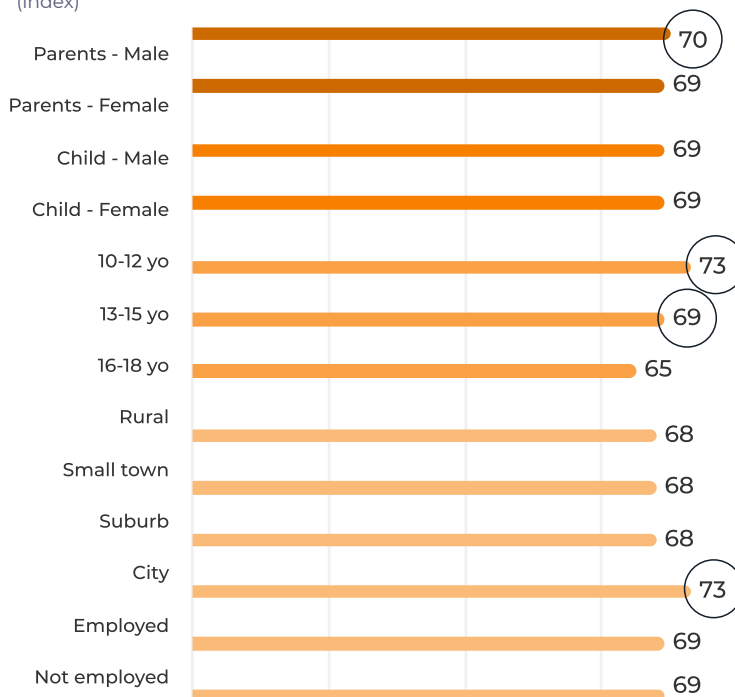


Differences in Parental Involvement Index

Parents whose children received tutoring had the highest Involvement Index. These parents were also more likely to get involved in other areas of their children’s school experience. (see the following slide for details).

Parents of 10–15-year-olds were more likely to get involved than parents of 16–18-year-olds and those in large cities.

(index)



Overall n=6285
 Male n=3279 | Female n=2992
 10-12 n=2002 | 13-15 n=2234 | 16-18 n=2029
 Rural n=1321 | Small town n=2381 | Suburb, n=1083 | City n=1481
 Employed n=4824 | Not employed n=1460
 Tutored n=968 | Not tutored n=4962

UK n=1001 | NL n=1001
 IT n=1001 | FR n=1005
 ES n=1012 | DE n=1000
 AT n=265

- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance

Spain had the top Parental Involvement Index across all aspects of education.

01

Across all countries, parents were most involved with getting regular updates on grades (3.9).

02

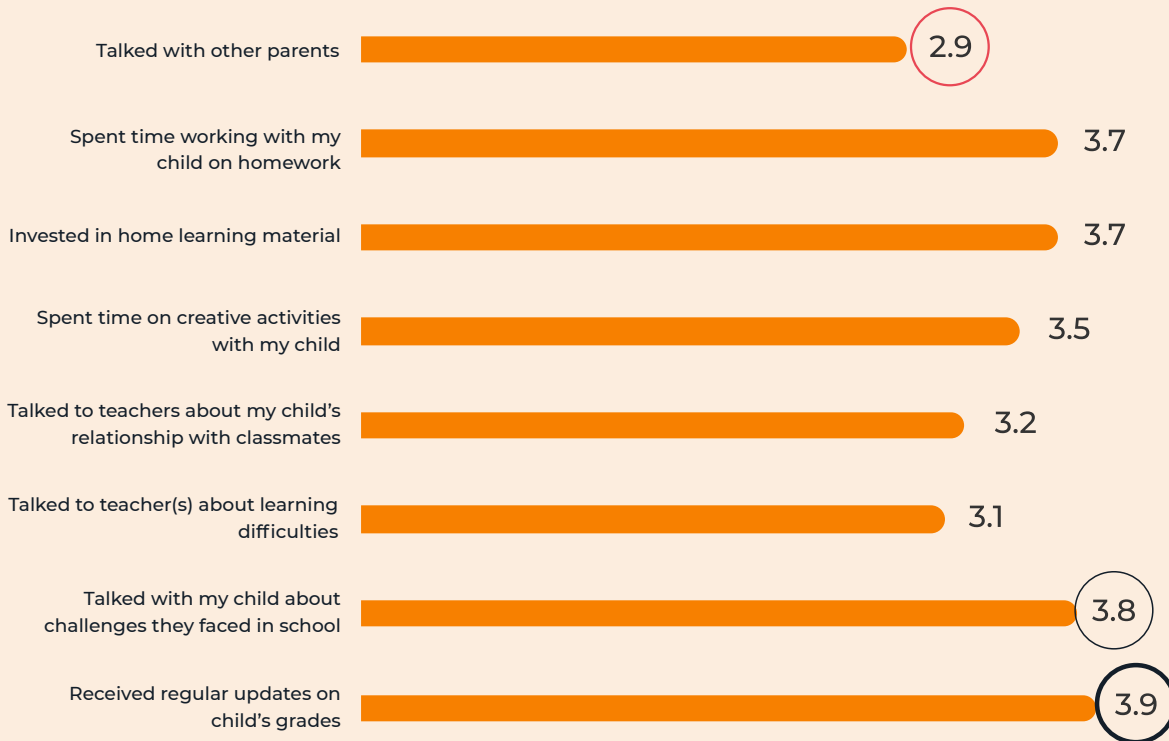
Parents were next most involved by talking with their children about challenges they faced in school (3.8).

03

Parents were least likely to get involved by talking to other parents (2.9).

Parental Involvement

Q8: How involved were you in the following aspects of your child's education during the last school year?
(Index)



○ 1 Greatest significance ○ 2 Second place significance
○ 3 Third place significance ○ Greatest lowest significance



Spain scored highest across all areas of parental involvement.



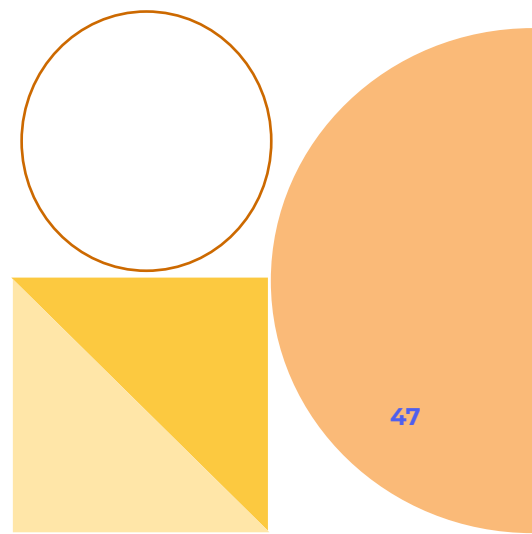
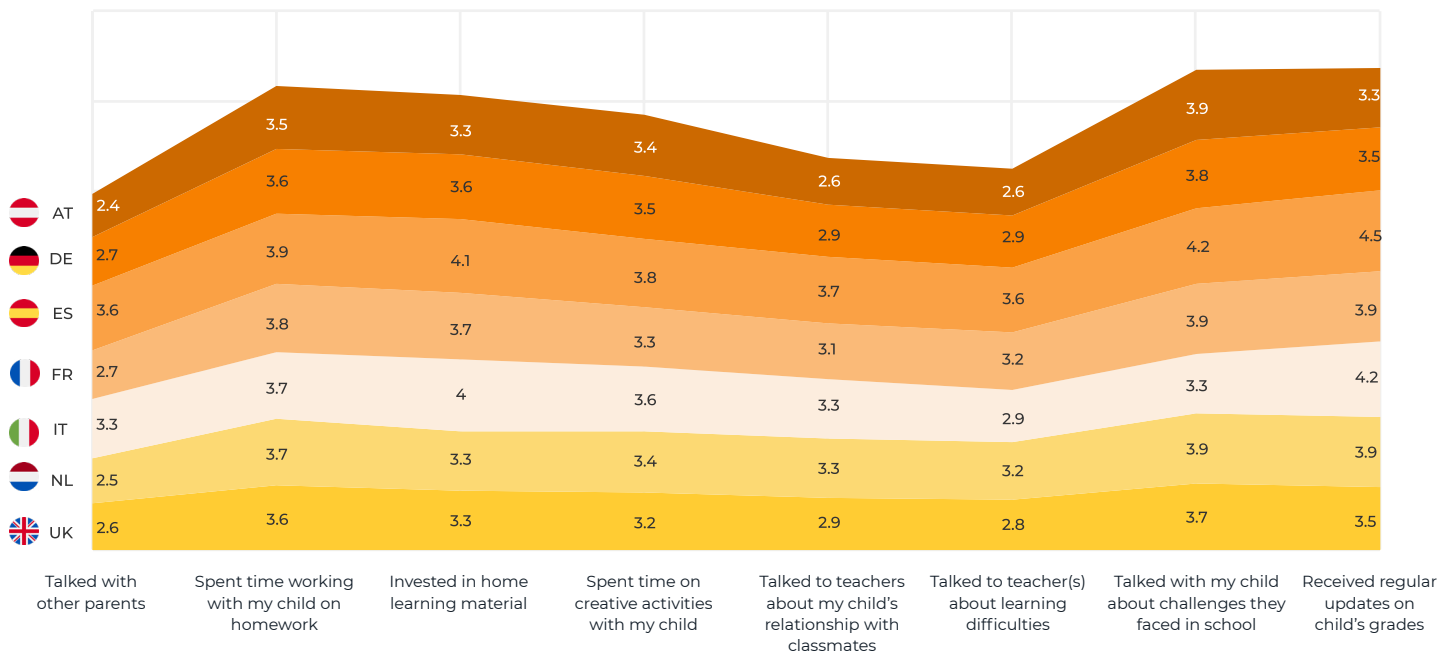
Spain, Netherlands and Italy were most likely to talk to teachers about their children's relationship with classmates.



The UK and Austria fell to the bottom on all areas of parental involvement.

Parental Involvement – Country Index

(index)



Parental Involvement Index was higher among children who were tutored.



Tutored children also received other support such as educational online videos.



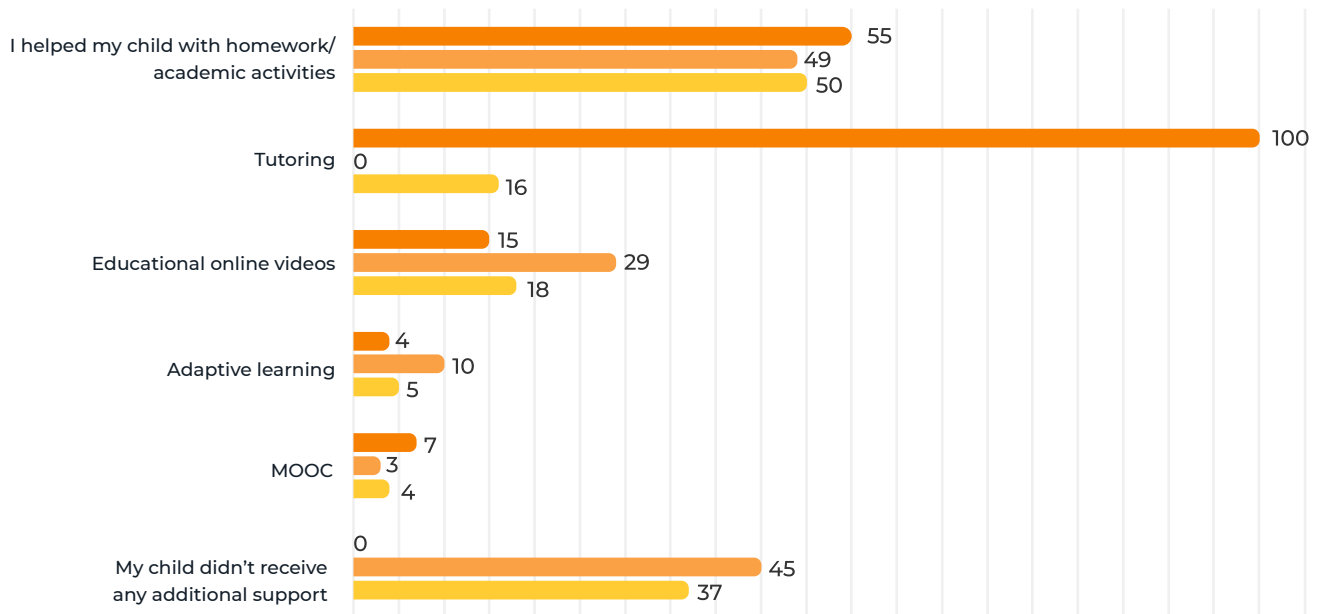
Less than 10% of children were supported by Adaptive Learning and MOOC.



Children in Spain received the most amount of tutoring (31%).

Additional support children received (%)

Q9: During the last school year, did your child receive any support beyond what was provided by the school?



Tutored,
Parental Involvement Index: 76

Not tutored,
Parental Involvement Index: 68

Overall scores,
Parental Involvement Index: 69

50%

Children in France received the least additional support (50%).

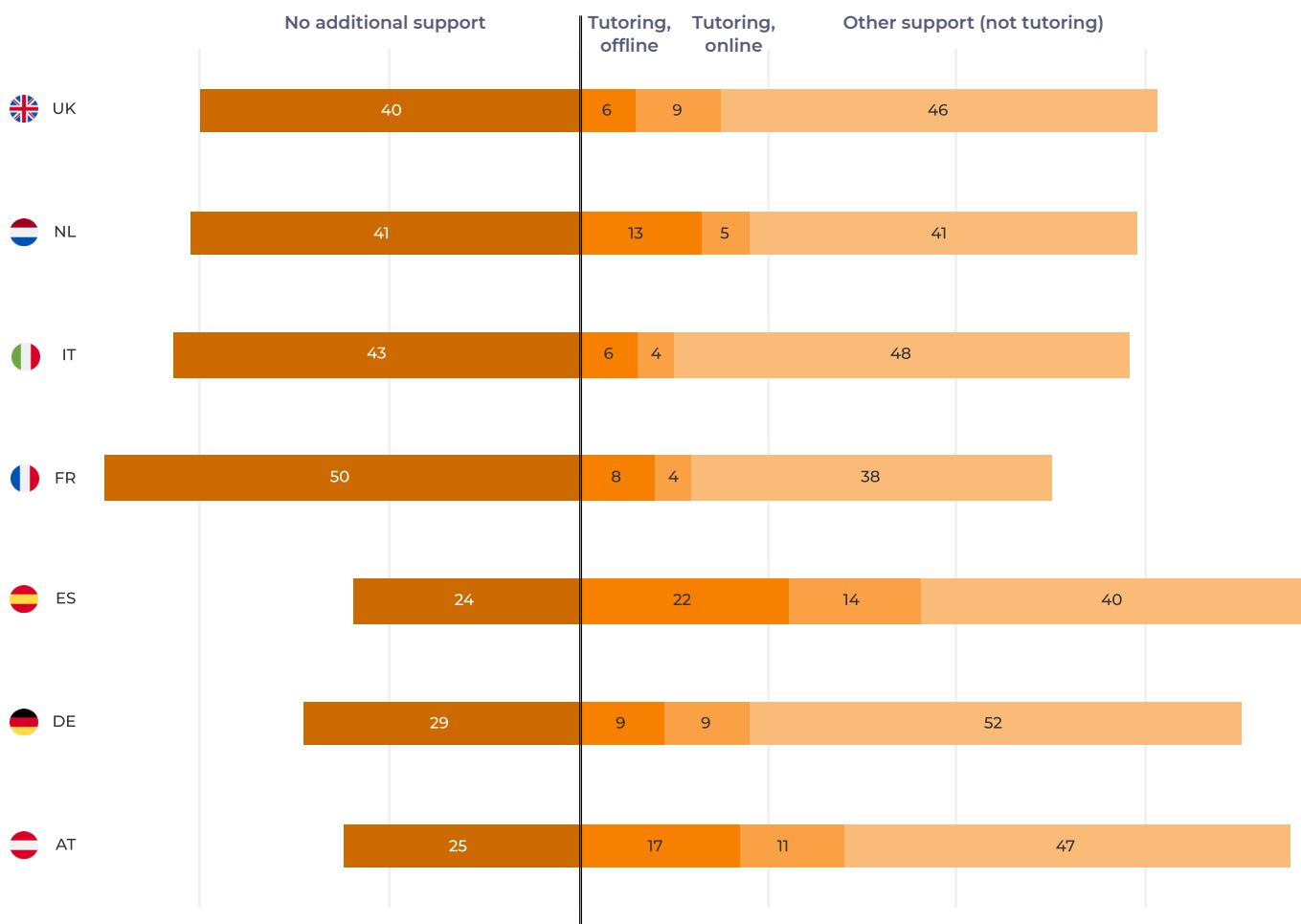
31%

Children in Spain received the most tutoring (31%).

8%*

Children in Italy (8%*) followed by the UK (12%*) received the least amount of tutoring.

(%)



*The sum of the percentages for tutoring types can be greater than the percentage of overall tutoring. This is because one person can receive both types of tutoring at the same time.

Overall n=6285
 Male n=3279 | Female n=2992
 10-12 n=2002 | 13-15 n=2234 | 16-18 n=2029
 Rural n=1321 | Small town n=2381 | Suburb n=1083 | City n=1481
 Employed n=4824 | Not employed n=1460
 Tutored n=968 | Not tutored n=4962

UK n=1001 | NL n=1001 | IT n=1001 | FR n=1005 | ES n=1012 | DE n=1000 | AT n=265

School Performance & Parental Satisfaction Score

Calculating Score

Parental Satisfaction Score

Parental Involvement Index; Weighted average – index to 100

Parental Satisfaction Score defines how satisfied parents were with their child's school performance.

How satisfied are you with your child's academic performance in general?

Calculated as an average (mean) on a 5-point scale across aspects of parental satisfaction, where 1 = Very dissatisfied & 5 = Very satisfied.

Last year's Parental Satisfaction Score was **4.0**

The Parental Satisfaction Score was similar across most countries.



France has the highest Parental Satisfaction Score (4.12).



Germany has the lowest (3.87) Parental Satisfaction Score.

Languages scored above Science & Maths overall.



Girls did better in foreign languages (3.89) in comparison to boys (3.68).

10-12

year-olds did better (3.9) than 13-18-year-olds (3.7).

Overall Parental Satisfaction Score: 4.0

Parental Satisfaction Score

Q13: How satisfied are you with your child's academic performance in general?



France (4.12) has the highest Parental Satisfaction Score (not significant against Spain).



Spain (4.09) comes in second (better than the Netherlands, Germany, Italy and the UK).



Germany had the lowest score (3.87).

Language scored above Science and Maths.



Italy scores higher than other countries across all subjects.



Girls did better in foreign languages (3.89) in comparison to boys (3.68).

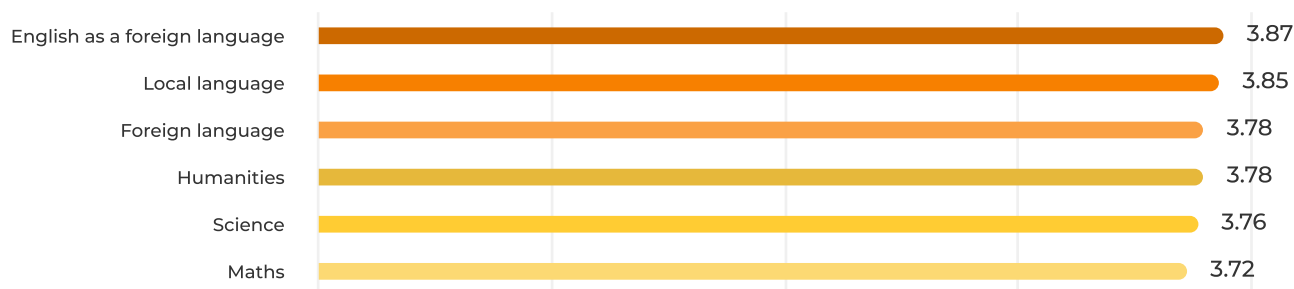
10-12

year-olds did better (3.9) than 13-18-year-olds (3.7).

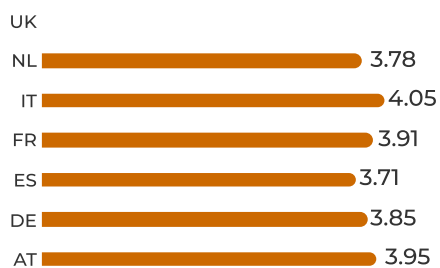
Parental ranking of school grades

Q14: Please enter your child's end of year performance using the following scale:

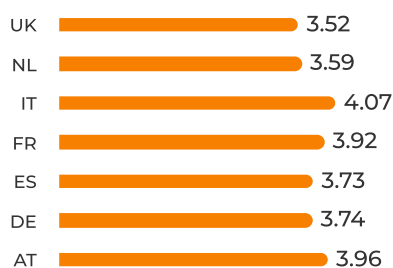
5 – Excellent, 4 – Good, 3 – Average, 2 – Below Average but passing, 1 - Failed



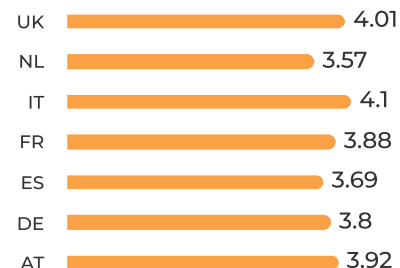
English as a foreign language



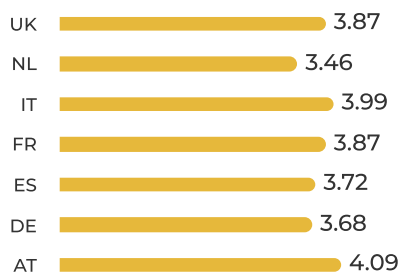
Foreign language



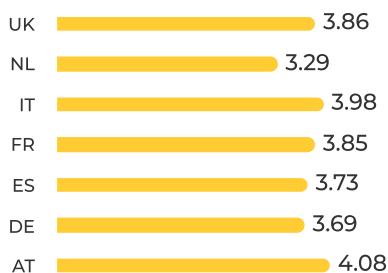
Local language



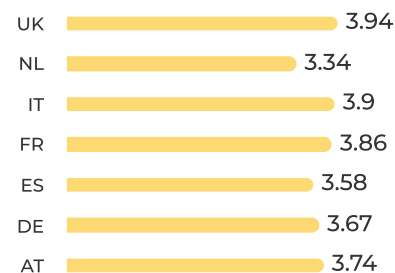
Humanities



Science



Maths



Overall n=6285

Male n=3279 | Female n=2992

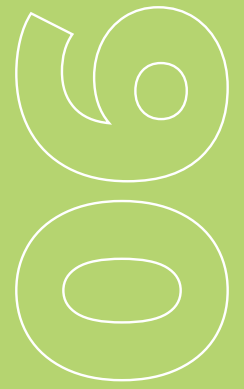
10-12 n=2002 | 13-15 n=2234 | 16-18 n=2029

Rural n=1321 | Small town n=2381 | Suburb n=1083 | City n=1481

Employed n=4824 | Not employed n=1460

Tutored n=968 | Not tutored n=4962

UK n=1001 | NL n=1001 | IT n=1001 | FR n=1005 | ES n=1012 | DE n=1000 | AT n=265



Adaptive Learning



Adaptive Learning

Adaptive Learning

Adaptive Learning is defined as a way of learning by the use of online programs that enable interactive learning via a data-driven and AI-based (artificial intelligence) approach that adjusts pace and exercises according to responses and ability.

AI Penetration

AI Penetration defines the degree to which AI-based learning solutions are used in school.

Perceived Usage of AI

Perceived usage of AI defines how AI should be used in education, from the parents' perspective.

AI (Artificial Intelligence) Adoption

AI Adoption defines the degree to which AI-based learning solutions are provided by parents to support their children's learning outside of school.

Attitude towards AI

The attitude towards the usage of AI defines the level of acceptance there is towards AI-based learning solutions, from the parents' perspective.



34%

Interactive Tools were stated as the most used method (34%).

28%

of students had no digital learning methods used in their schools.

27%

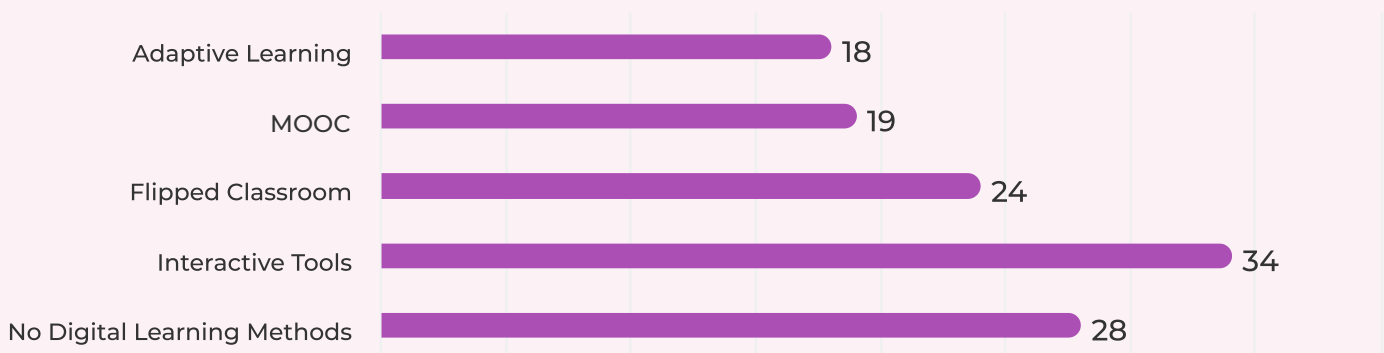
The highest AI penetration is in the Netherlands (27%), followed by Spain (23%).



Overall, AI penetration in schools is low (18%) compared to other methods.

Penetration of digital learning methods in school (incl. AI) (%)

Children: Which of the following digital learning methods did your school use?





The Netherlands has the highest AI penetration level in schools, although parents are the least likely to be in favour of AI (along with the UK and France).



Spain also has the second highest AI penetration level in schools and parents are the most in favour (having a positive attitude) of AI in education.

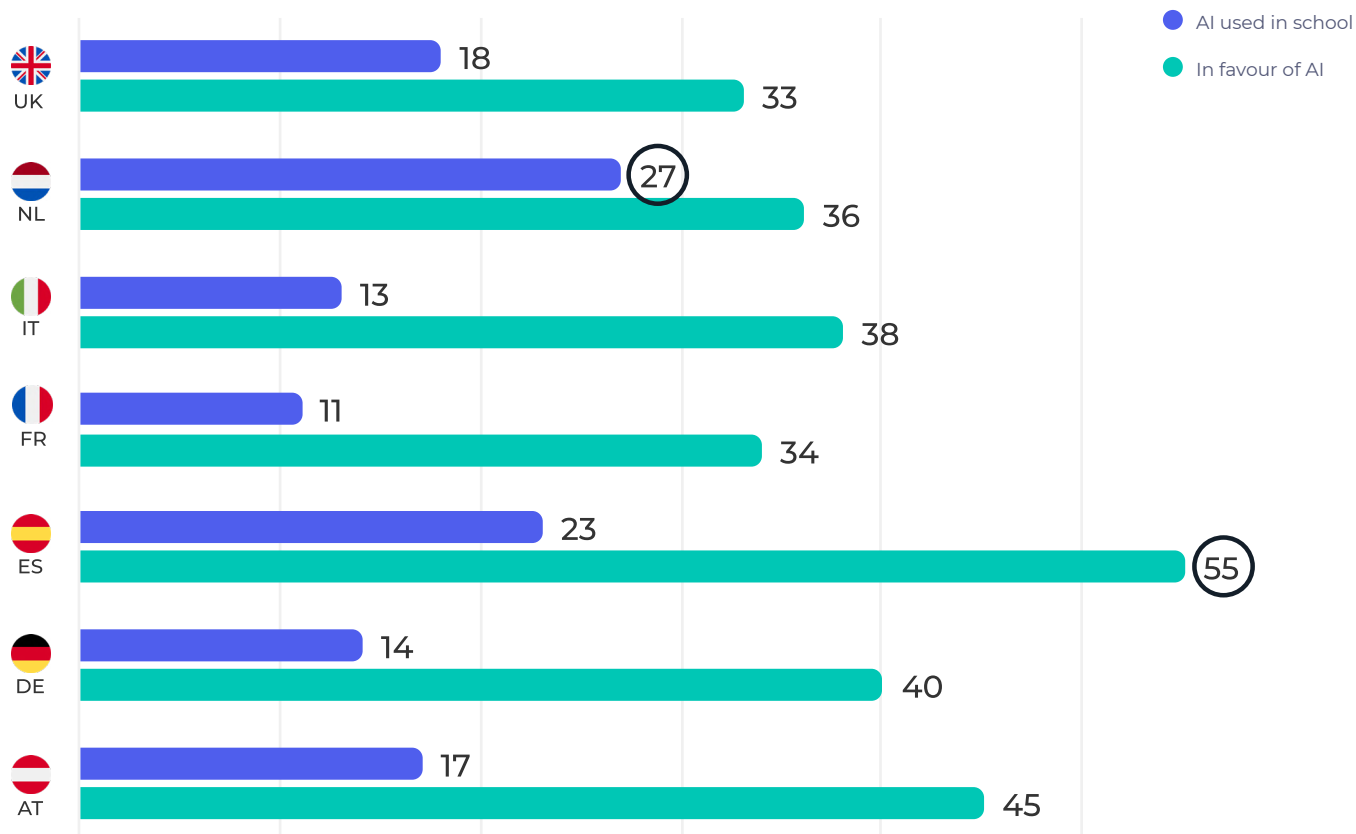


France has the lowest penetration level (11%) and is one of the least in favour of AI (34%).

Penetration of AI in school – by country (%)

Children: Which of the following digital learning methods did your school use?

Parents: In general, what do you think of Adaptive Learning and the use of Artificial Intelligence in education?



- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance

Adoption of AI as an additional resource is **5%**.



Adoption of AI as an additional resource is under 10% across all countries.



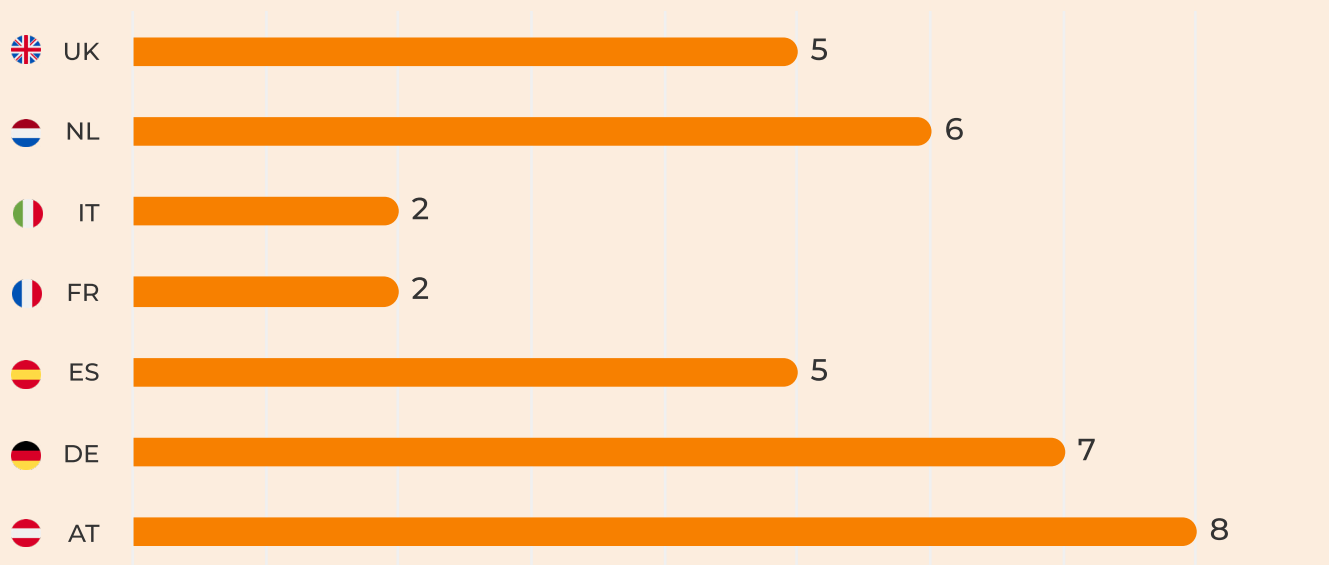
Spain is the most favourable towards AI (55%).



Austria and Germany have the biggest difference within their countries on attitude towards AI.

Adaptive Learning (AI) as an additional resource (%)

During the last school year, did your child receive any support beyond what was provided by the school?





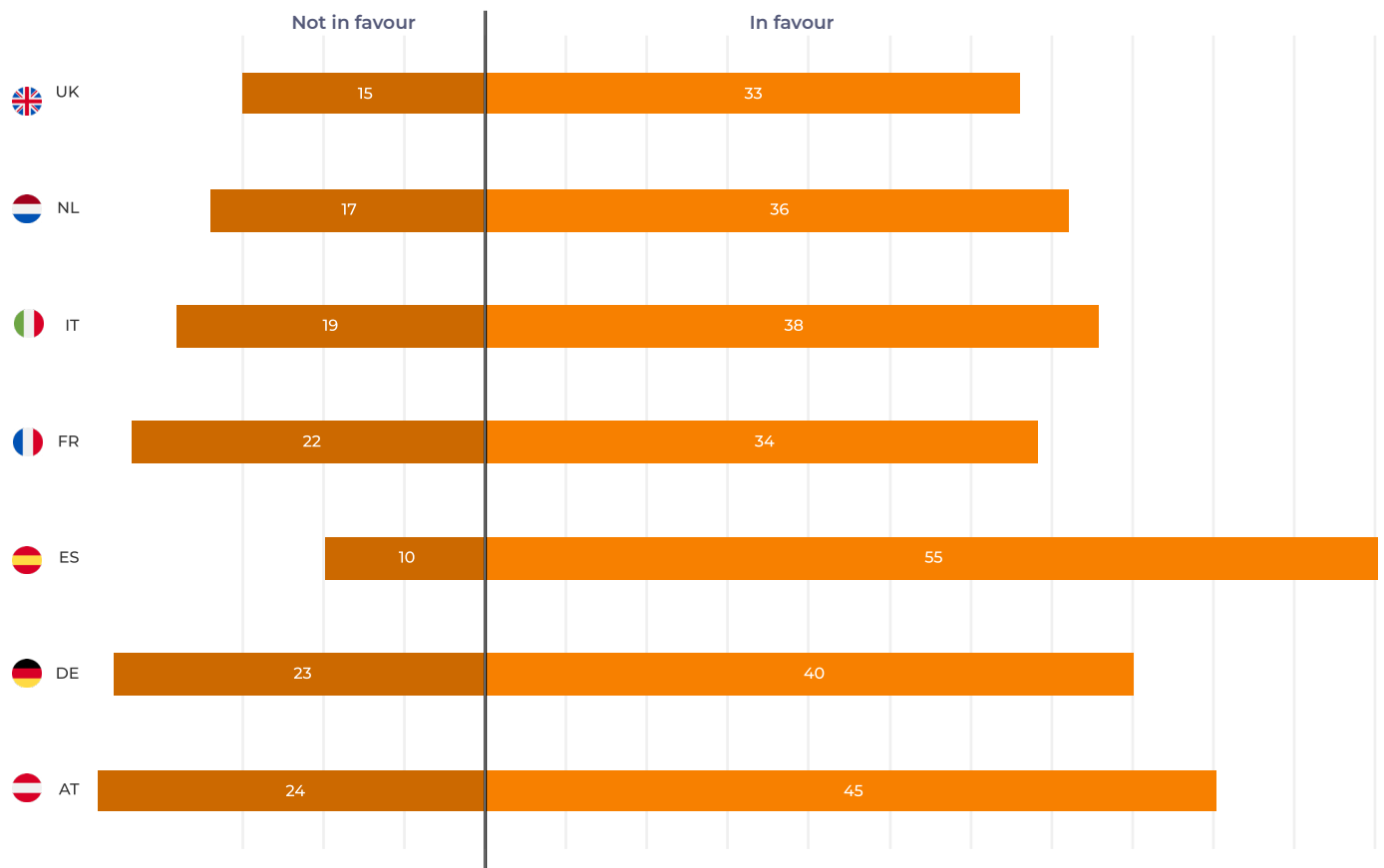
Spain is most in favour of AI (55%).



Austria (45%) and Germany (40%) come second place but both countries also have the highest percentage of those not in favour (23%) along with France (22%).

Parents in favour vs not in favour of AI (%)

In general, what do you think of Adaptive Learning and the use of Artificial Intelligence in education? Excluded: Participants who selected 'neutral'.



Overall n=6285

Male n=3279 | Female n=2992

10–12 n=2002 | 13–15 n=2234 | 16–18 n=2029

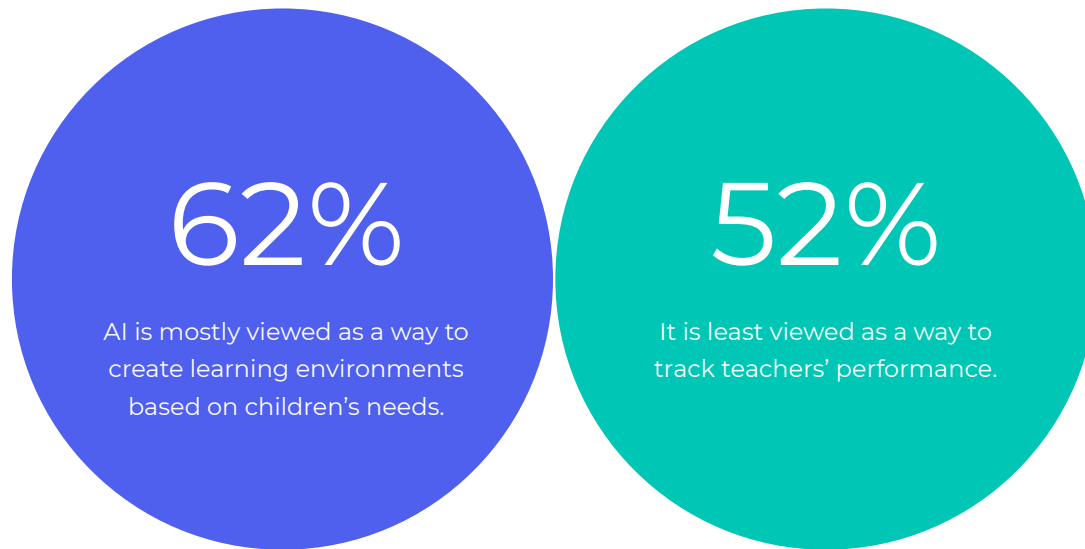
Rural n=1321 | Small town n=2381 | Suburb n=1083 | City n=1481

Employed n=4824 | Not employed n=1460

Tutored n=968 | Not tutored n=4962

UK n=1001 | NL n=1001 | IT n=1001 | FR n=1005 | ES n=1012 | DE n=1000 | AT n=265

AI usage is seen as a tool to support children’s learning, based on their needs.



Usage of Adaptive Learning (%)

AI should be used



Note: Parents whose children receive tutoring score significantly higher than those that don't across all 4 AI use cases.

74% Spain (74%), out of all the countries, most views AI as a tool to create learning environments based on kids' needs.

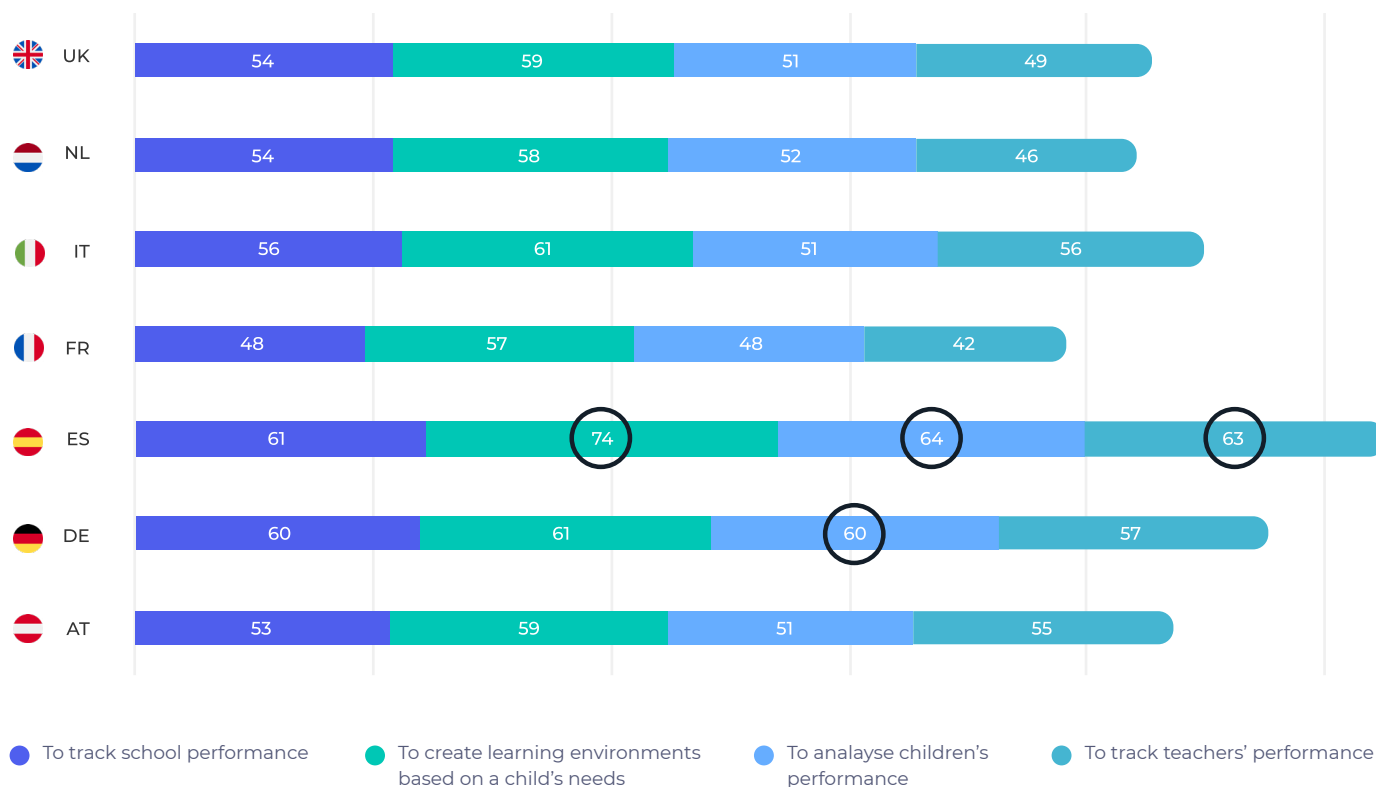
63% Spain (63%) also most views AI as a way to track teacher's performance.

64% Spain (64%) and Germany (60%) view AI as a way to analyse children's performance.

61% Spain (61%) and Germany (60%) view AI as a way to track school performance.

Usage of Adaptive Learning – by country (%)

Q20: AI should be usedTop two box

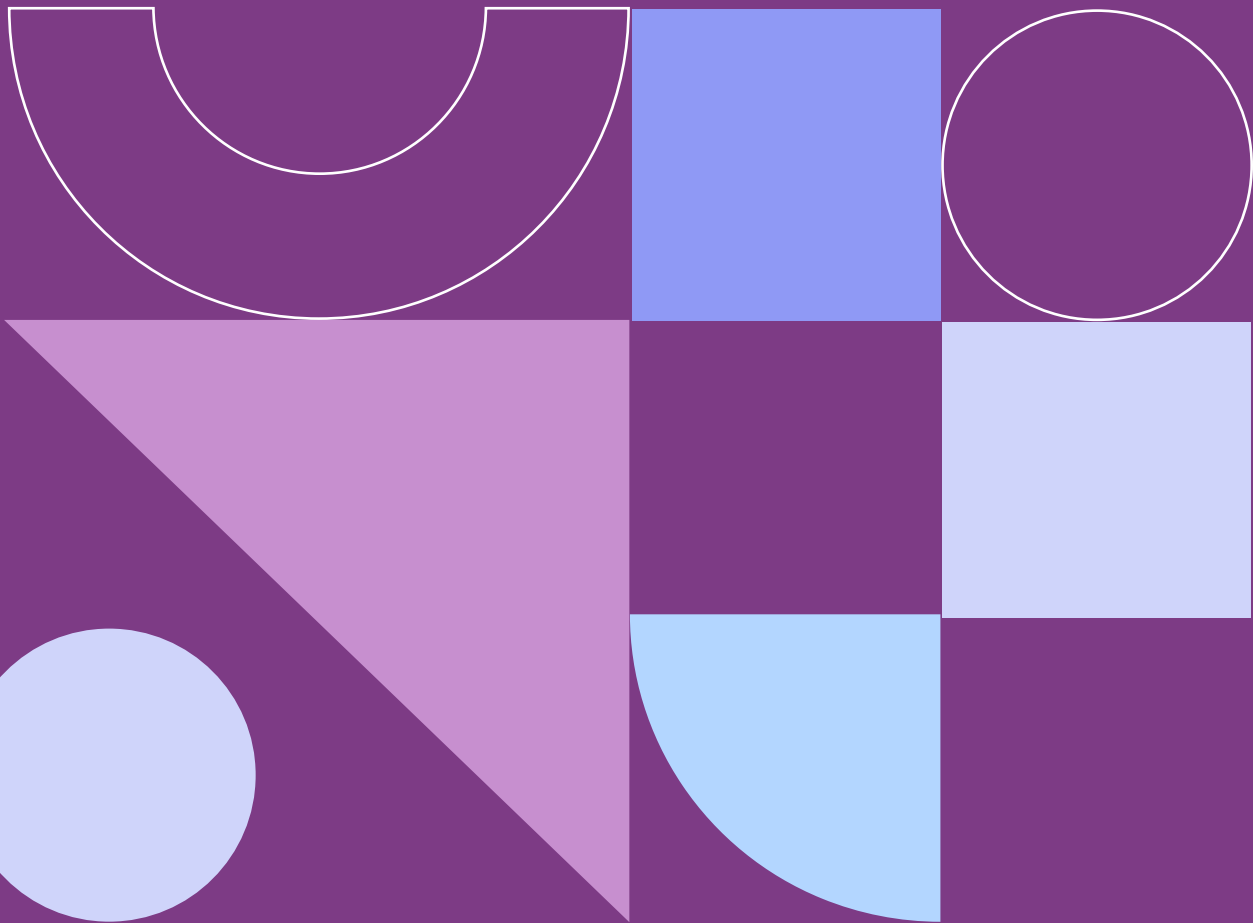


Overall n=6285
 UK n=1001 | NL n=1001 | IT n=1001 | FR n=1005 | ES n=1012 | DE n=1000 | AT n=265

○ 1 Greatest significance
○ 2 Second place significance
○ 3 Third place significance

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Online Learning Index



Calculating Index

Online Learning Index & Online Learning Ratio

Online Learning Index & Online Learning Ratio

Online Learning Index (parent's perspective) describes the number of children who experienced online learning during the last academic year.

Calculated as the percentage of those whose children had online learning to any degree.

Q10: Considering all the different educational activities, how did your child learn last year?

Please consider any classroom time along with any additional educational activities (e.g., tutoring, learning outside the school curriculum).

- In-person only
- Online only
- More in-person and some online
- More online and some in-person
- Equally online and in-person
- My child was home schooled

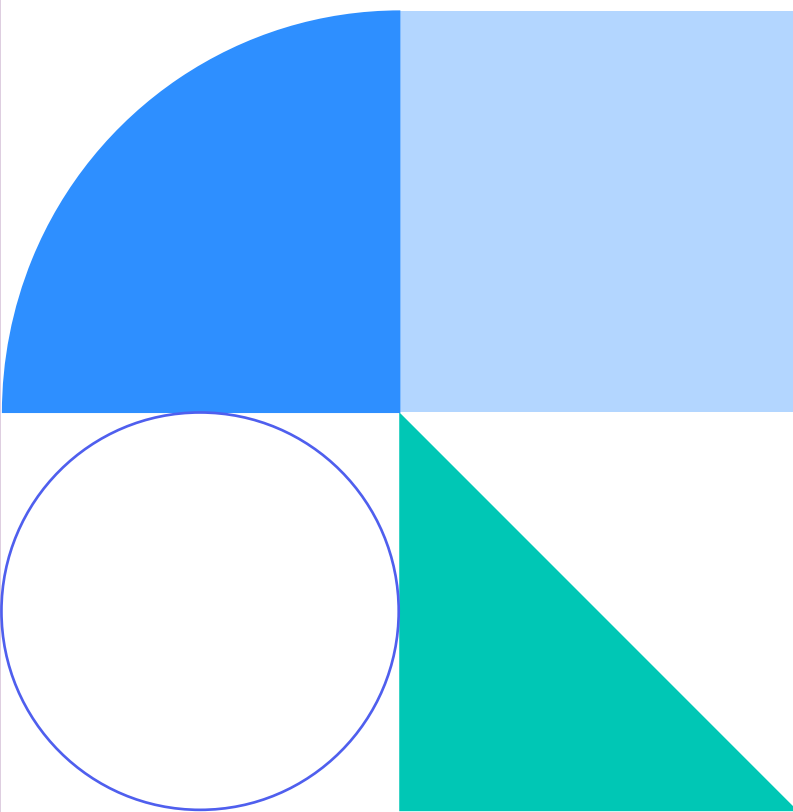
Online Learning Ratio is the amount of time that children spent learning online, in relation to the total amount of time spent learning. This takes into account the children's and the parents' perspectives.

Q12: What was the split between online versus in-person learning for a typical week?

Please only consider the time your child spent learning in the presence of a person, e.g., a teacher or tutor.

Calculated by dividing time spent for online learning by overall learning (online plus in-person).

Q45: How did you split your time between online versus in-person learning for a typical week?



Online Learning Index is **89%**, Online Learning Ratio is **47%** (parents' view) & **46%** (children's view).

Online Learning Index (89%)

Q10: Considering all the different educational activities, how did your child learn last year?

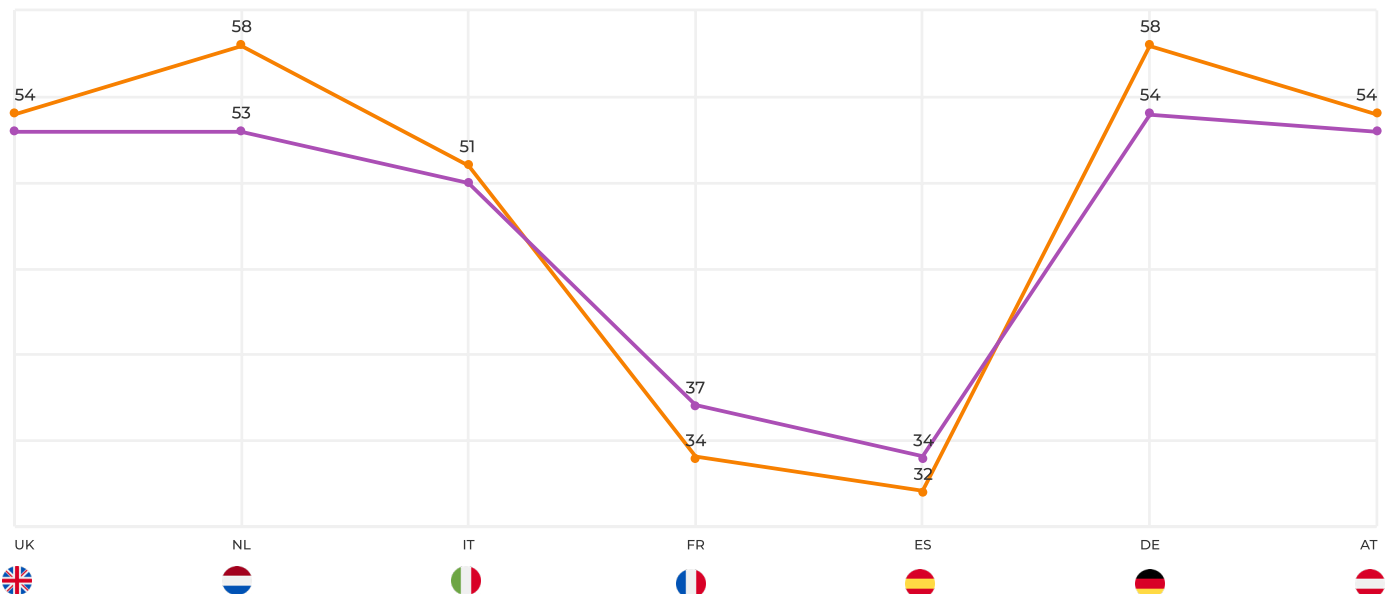


Online Learning Ratio – parents' (47%) vs children's view (46%)

● Parents' view
● Children's view

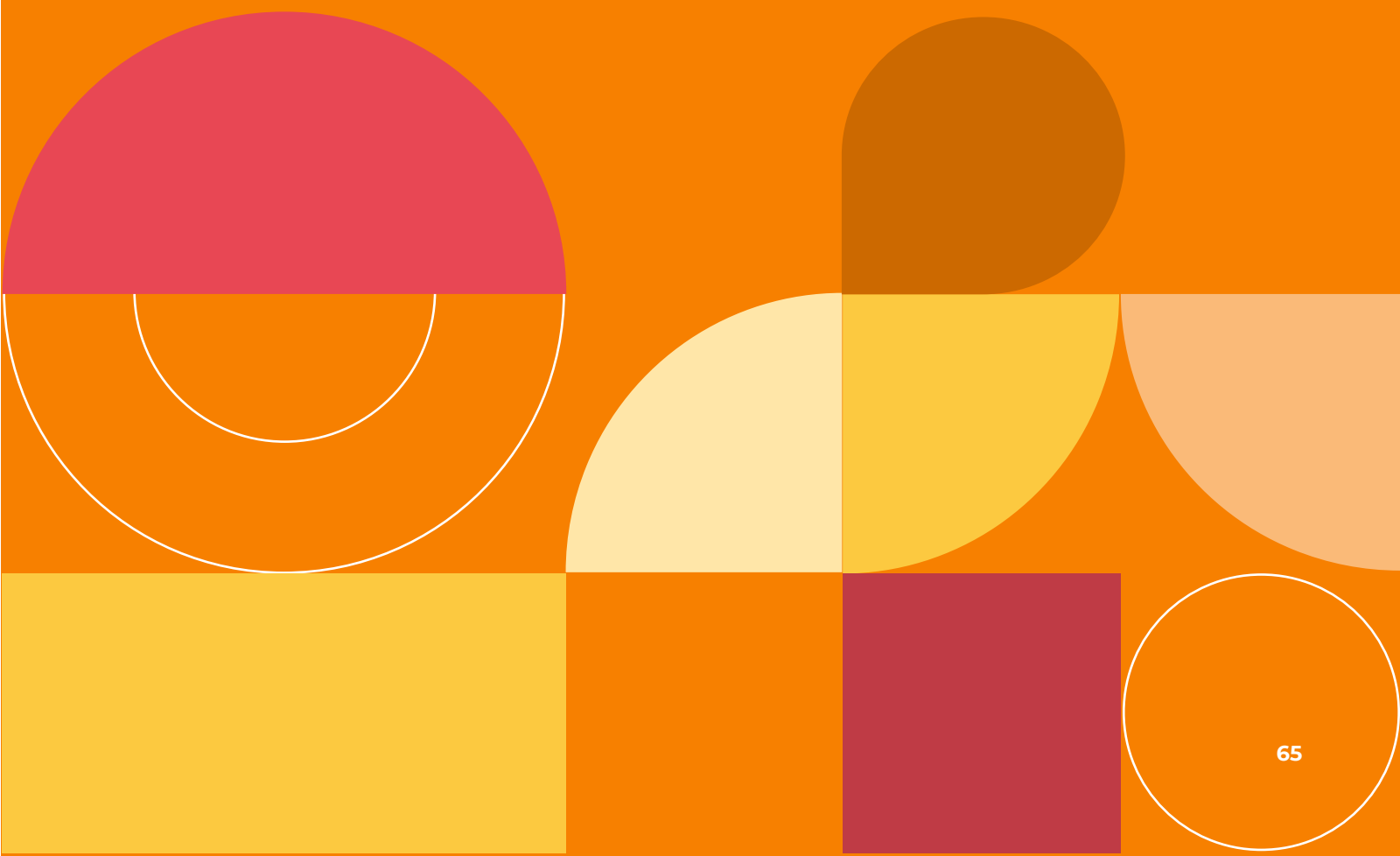
Parents Q12: What was the split between online versus in-person learning for a typical week? Please only consider the time your child spent learning in the presence of a person, e.g., a teacher or tutor.

Children Q45: How did you split your time between online versus in-person learning for a typical week?





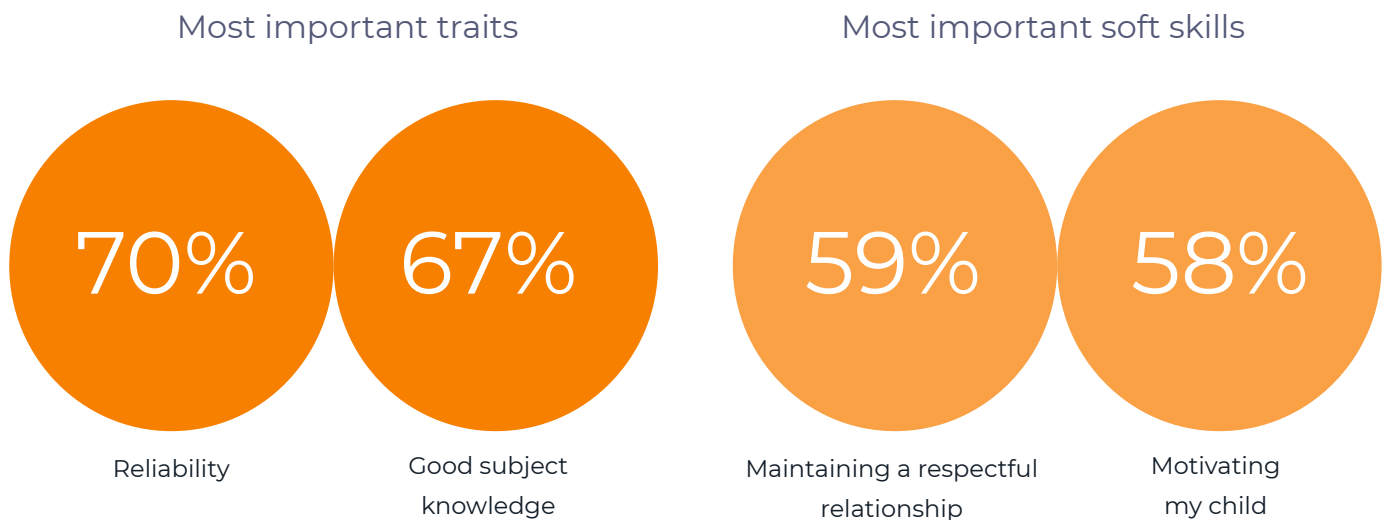
Tutoring Perspective



The Tutoring Perspective

Parents believe functional traits of a tutor are more important than soft skills.

The top two soft skills are less important than the top two functional skills.



Over **35%** of parents find that the benefits of tutoring online and in-person are equal.

- 01** Online tutoring is also seen to be cost-effective (35%), provide interactive learning (34%) and offer children a flexible learning schedule (34%).
- 02** Interaction between the child and the tutor is the most important aspect of online tutoring.
- 03** Children find online tutoring to be a comfortable and convenient environment (30%).

Parents claim there are three main advantages to having a tutor.

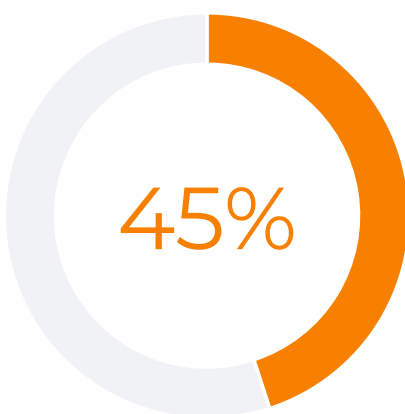
3 / 10

Out of all 10 advantages to having a tutor, only 3 stand out as being consistently important.

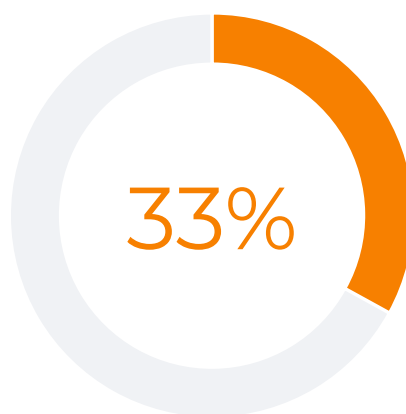


Main advantages to having a tutor

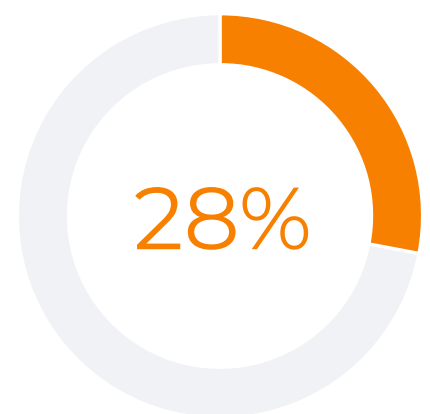
Q22: In which instance(s) would you consider a tutor/tutoring school for your child? Please rank these in order of importance.



To improve academic performance



To overcome learning obstacles



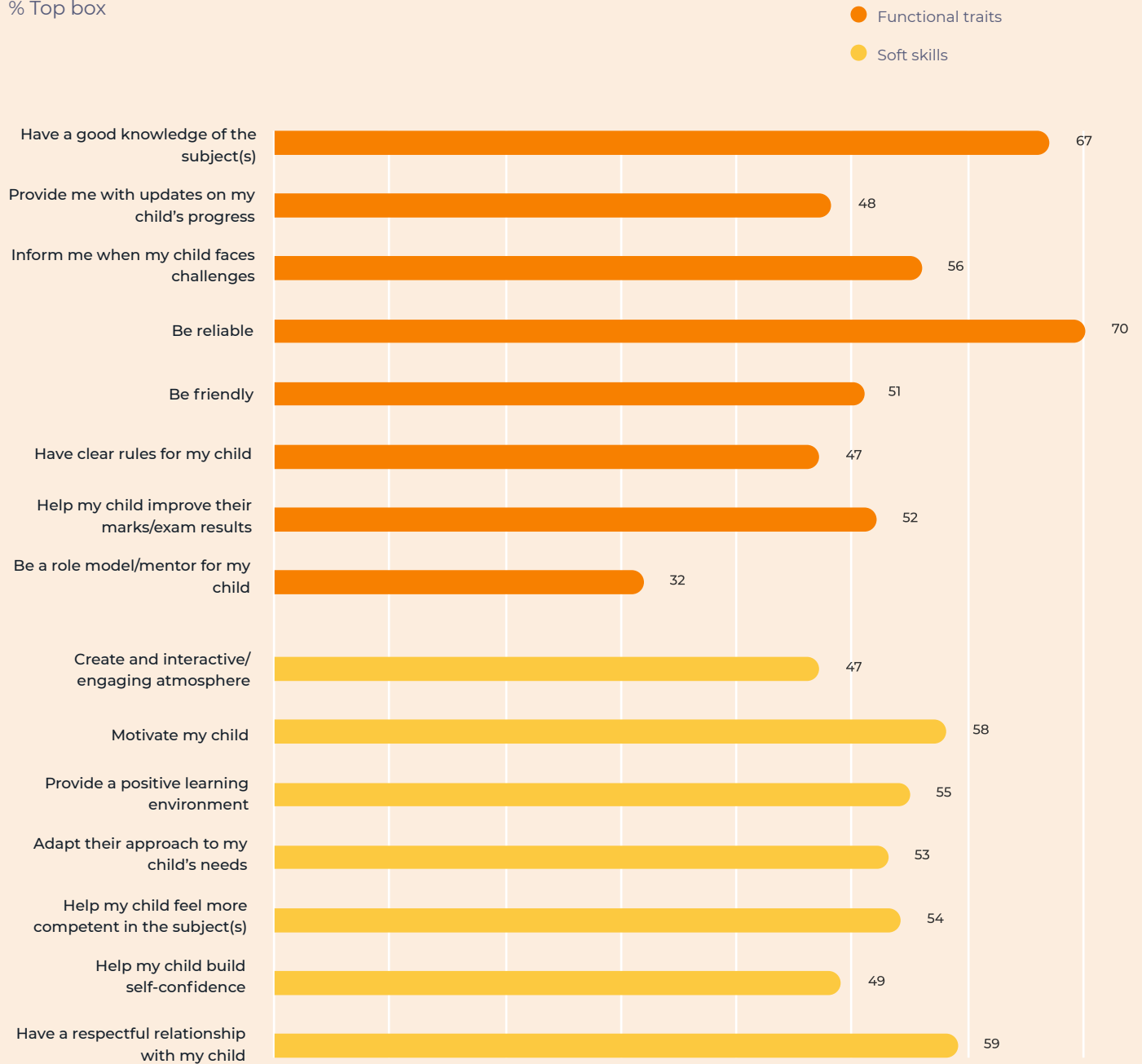
To boost confidence

Tutor traits – functional & soft skills

Q23/Q24: How important are each of these skills in a tutor?

The tutor should ...

% Top box



The most important functional tutoring traits are the same across countries.

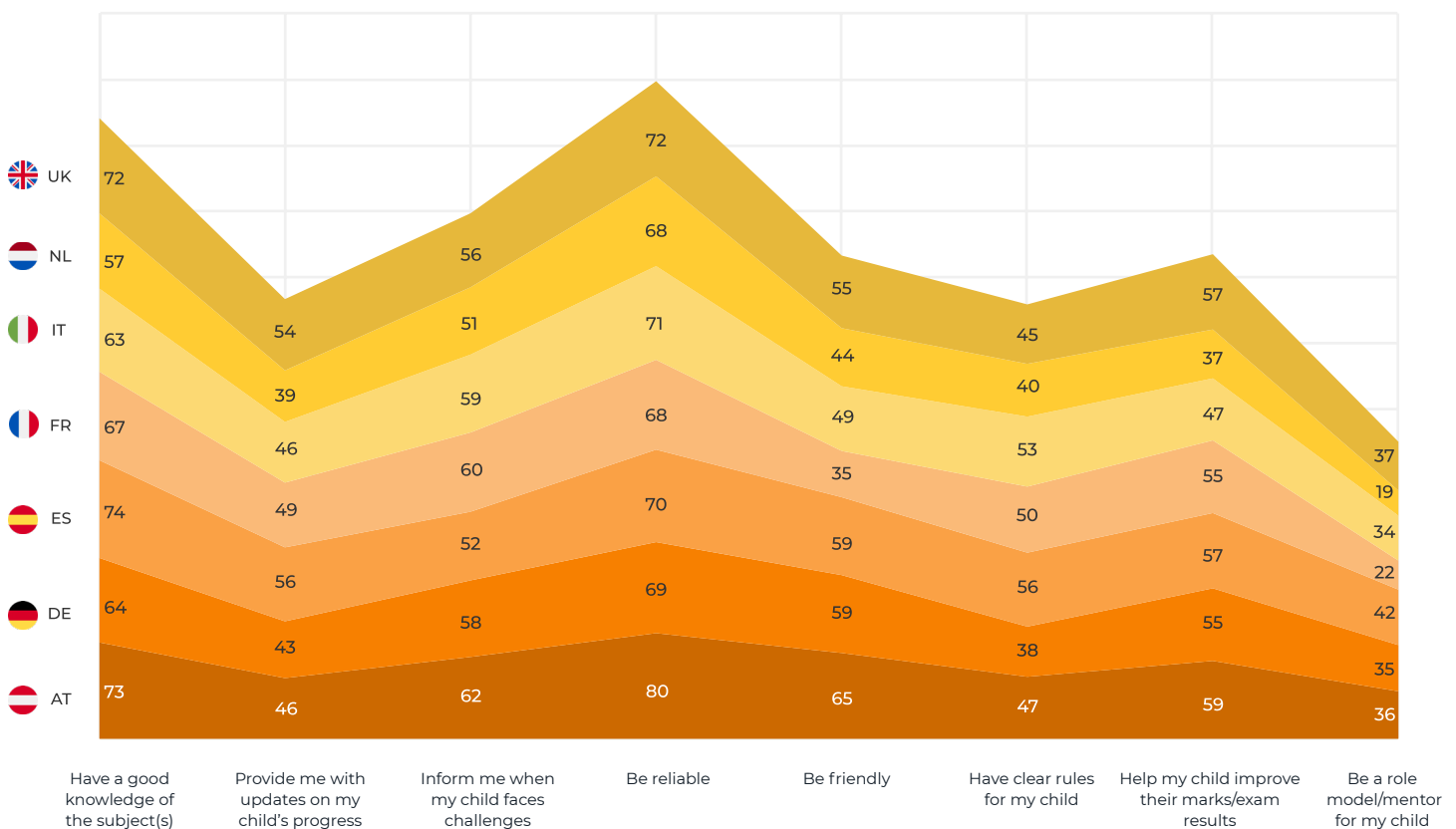
37%

The Netherlands (37%) ranks 'help improve my child's grades' the lowest.



Tutor traits – functional skills

Q23/Q24: How important are each of these skills in a tutor?
The tutor should ...
% Top box



Each country has a slightly different view on the most important soft skills in a tutor.

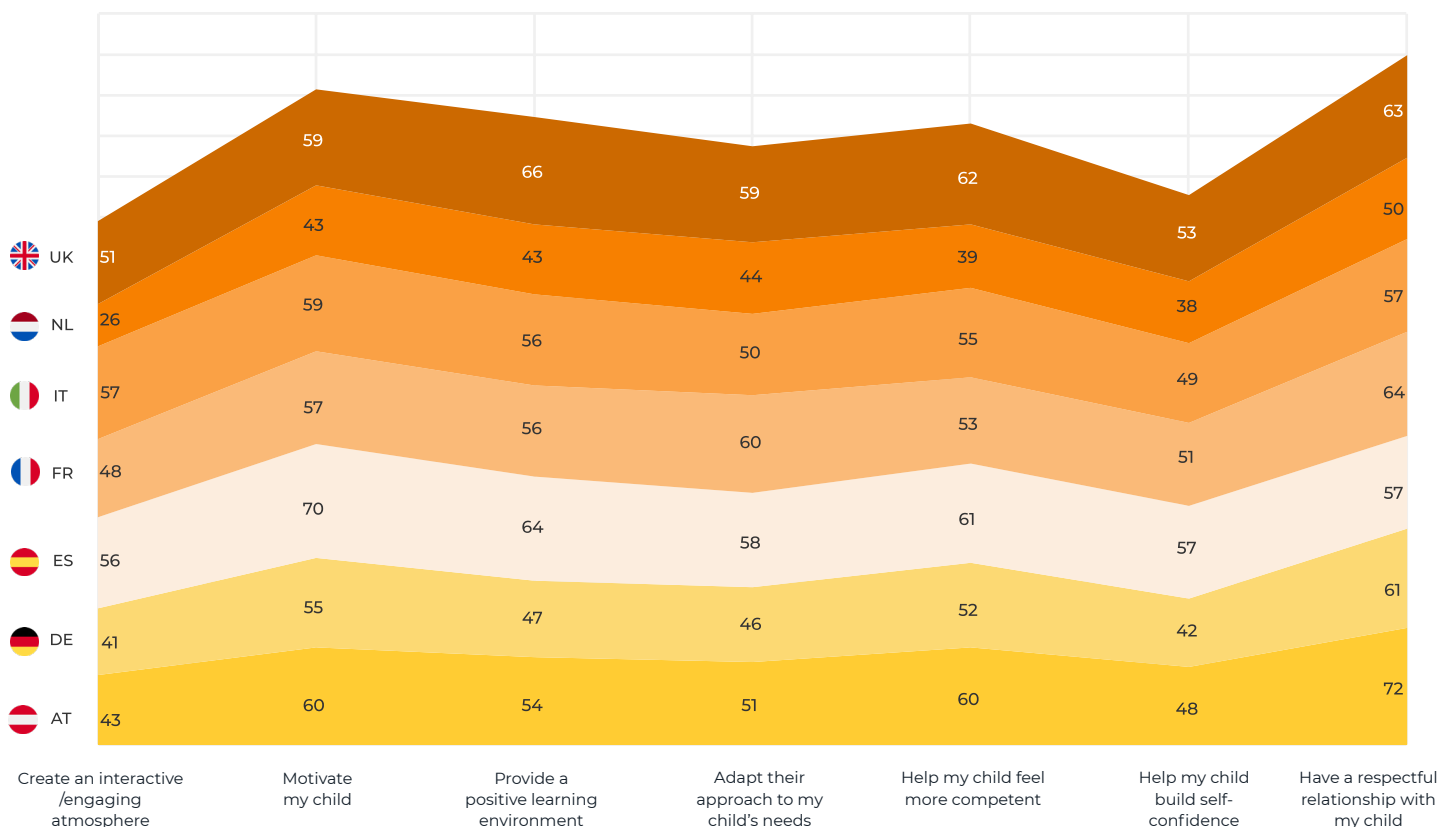
Having a respectful relationship with the child is ranked as most important in Austria (72%), Germany (61%), France (64%) and the UK (63%).

The Netherlands ranks creating interactive, engaging atmosphere as the lowest (26%).

Spain believes it is most important for a tutor to motivate the child (70%).

Tutor traits – soft skills (%)

Q23: How important are each of these skills in a tutor?
The tutor should ...



Over **35%** of parents find that the benefits of tutoring online and in-person are equal.

Online tutoring is most likely to save parents time (39%).

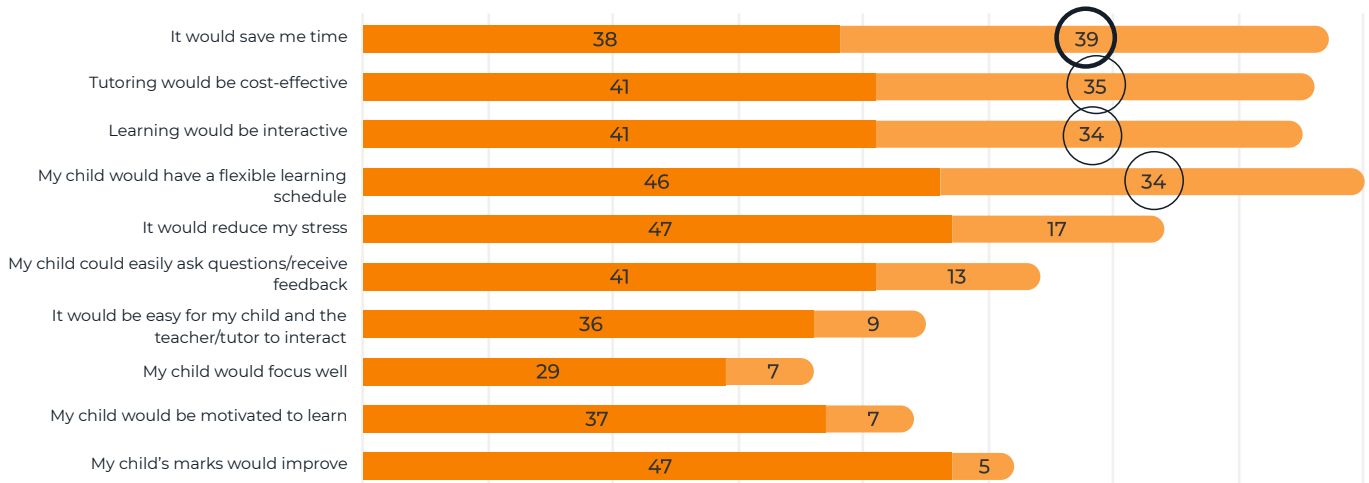
Online tutoring is also seen to be cost-effective (35%), provide interactive learning (34%) and offer children a flexible learning schedule (34%).

Children find online tutoring a comfortable and convenient environment (30%).

Benefits of online tutoring – parents’ perspective (%)

Please consider the differences and similarities between online and in-person tutoring and select whether each is more likely to be true online, offline or equally true for both.

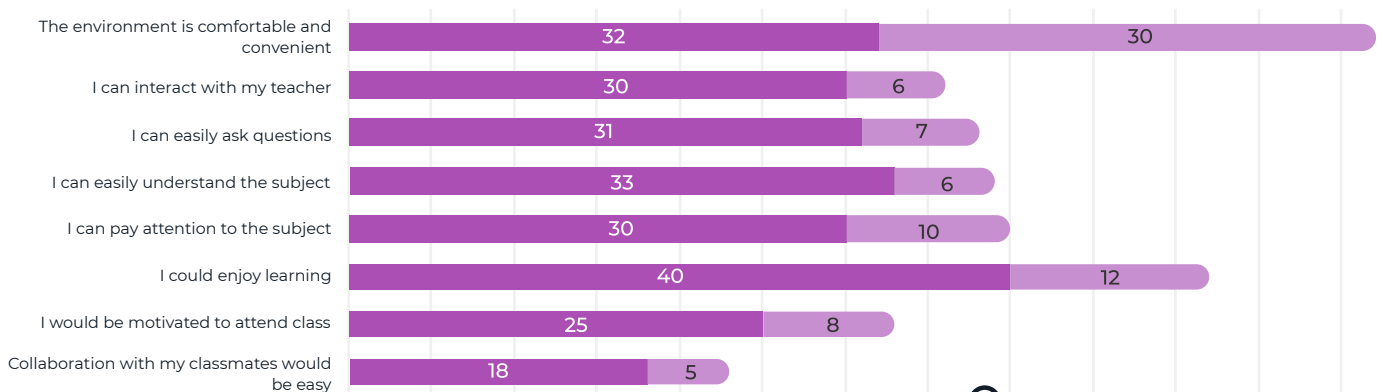
- Equal (equally likely to be true online or in-person)
- Online (more likely to be true)



Benefits of online tutoring – children’s perspective (%)

Q48: We want to know what you think about tutoring online versus in-person. Please drag each statement underneath the statement you agree with the most.

- Equal (equally likely to be true online or in-person)
- Online (more likely to be true)

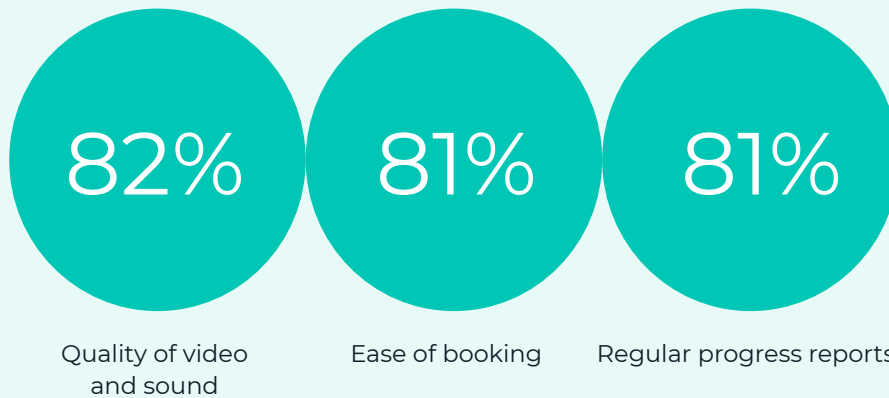


- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance

Overall n=6285 (parents)
Children, n=5767

Interaction between a child and their tutor is the most important aspect of online tutoring.

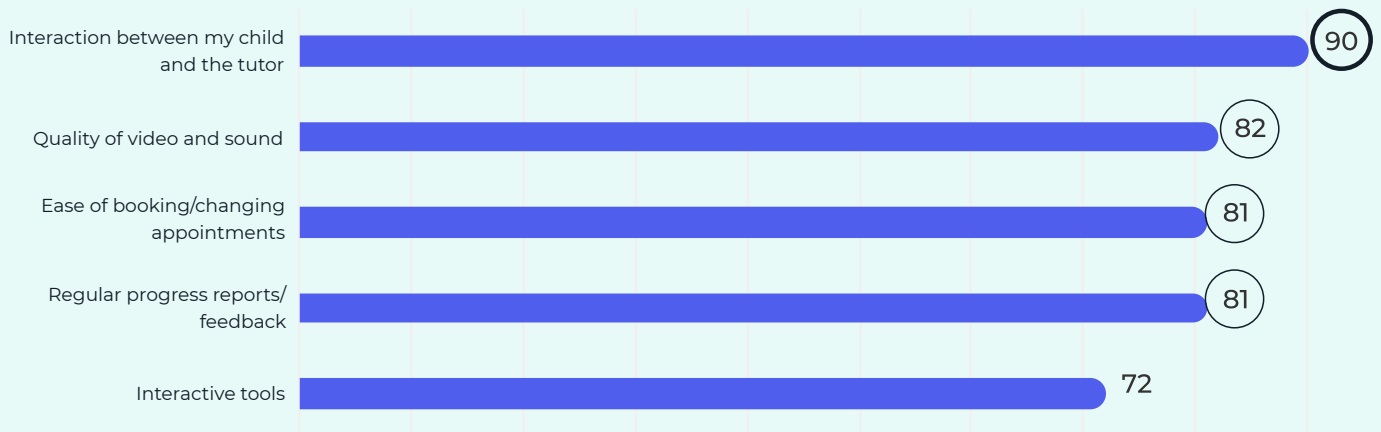
Three other aspects of online tutoring score equally on second importance.



All countries agree that the interaction between a child and their tutor is paramount.

Online tutoring features – overall (%)


How important are these features for online tutoring sessions?
TB2: Essential or Important




- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance

Some countries place greater priority on:

Regular progress reports:

 in France it ranks as the second most important feature (83%).

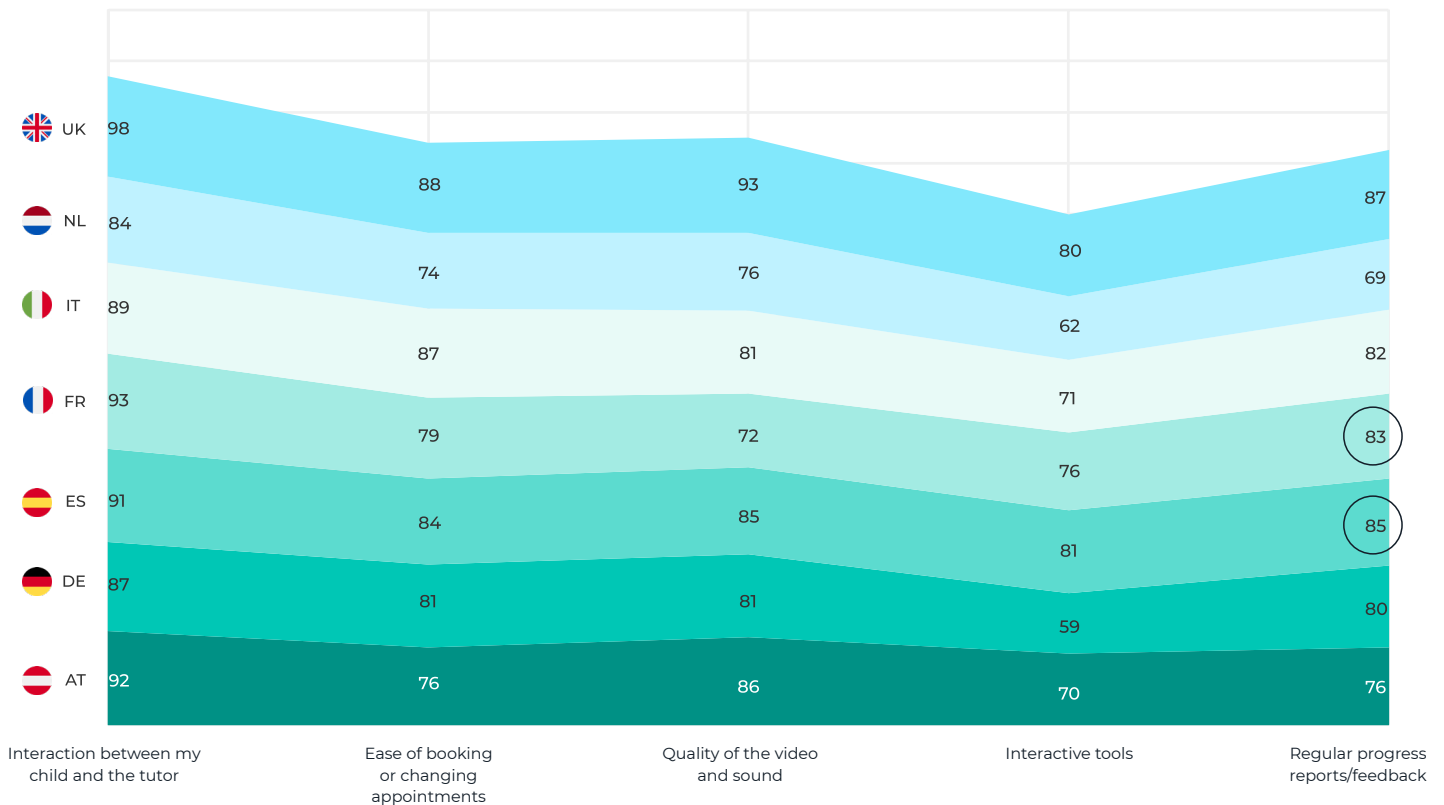
 in Spain it ties as the second most important feature with all other features (85%).




 Interactive tools are the least relevant feature in the Netherlands (62%).

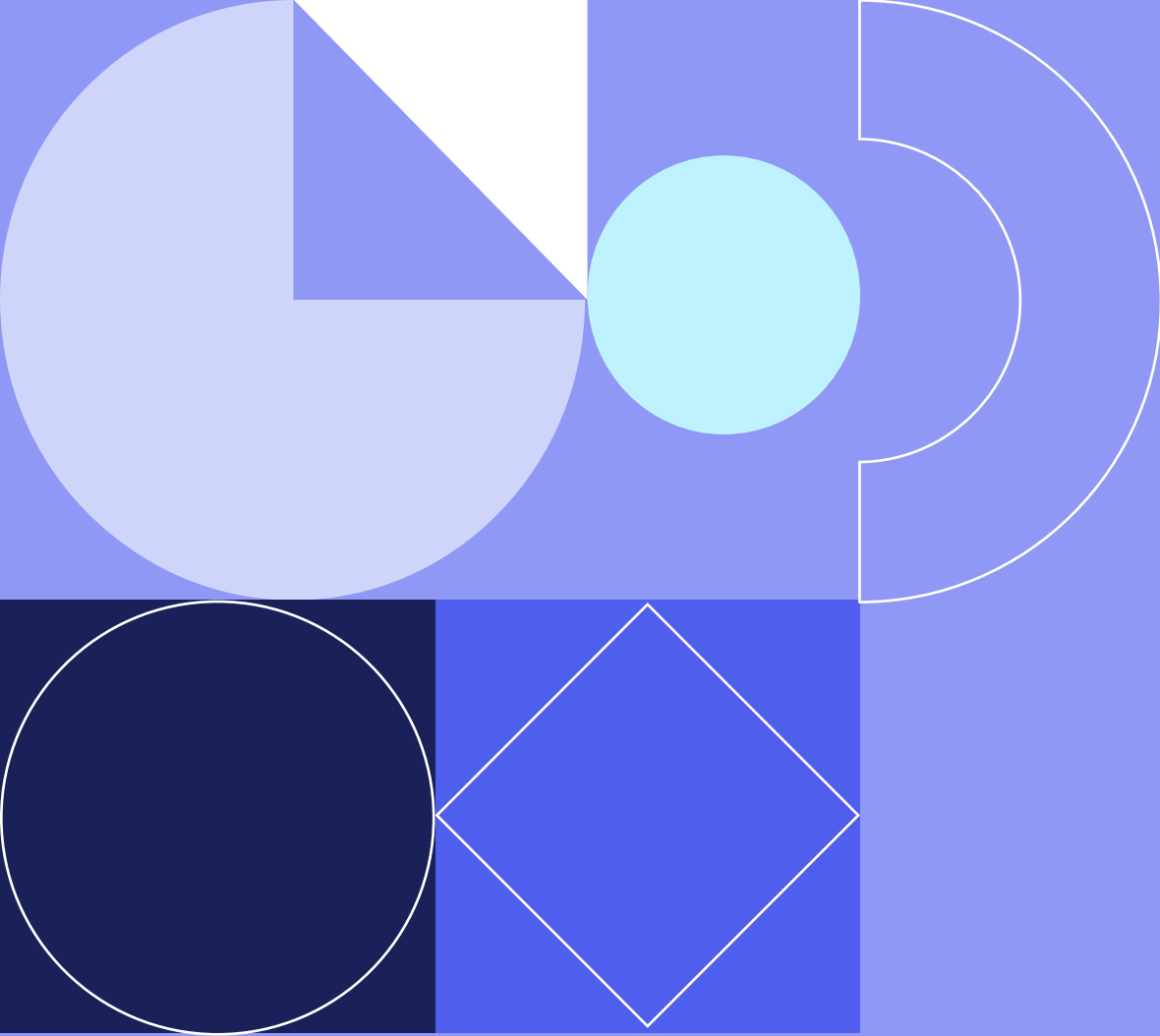
Online tutoring features – by country (%)

How important are these features for online tutoring sessions?

T2B: Essential or Important



-  1 Greatest significance
-  2 Second place significance
-  3 Third place significance



90

Tutoring Experience

Calculating Index

Tutoring Index

Tutoring Index & Online Tutoring Index

The Tutoring Index

Refers specifically to the proportion of children that received tutoring during the last academic year.

The Online Tutoring Index

Refers to the proportion of children that received tutoring during the last academic year.

Calculated on a ratio of online vs offline tutoring.

Q9: During the last school year, did your child receive any support beyond what was provided by the school?

- Overall = Any tutoring selected/Online Tutoring Index = Any online selected
- Adaptive Learning: Online programs that enable interactive learning via a data-driven (artificial intelligence) approach that adjusts pace and exercises according to responses and ability;
- Online one-to-one tutoring;
- Online group tutoring;
- In-person one-to-one tutoring;
- In-person group tutoring;
- Educational online videos (other than school material);
- Massive Open Online Courses (MOOC): Online courses available to any child who registers, via pre-recorded videos with an unlimited number of participants; I helped my child with their homework or other academic activities



Tutoring Experience refers to the proportion of children that have received tutoring before.

28%

of children have received tutoring at some point.

- More children received tutoring in the last school year (16%) vs in previous years (12%)

- Spain has the highest Tutoring Index Overall (31%) and Online (14%)

86%

of children receive tutoring once or a few times per week.

- 47% of tutoring sessions last 60 minutes

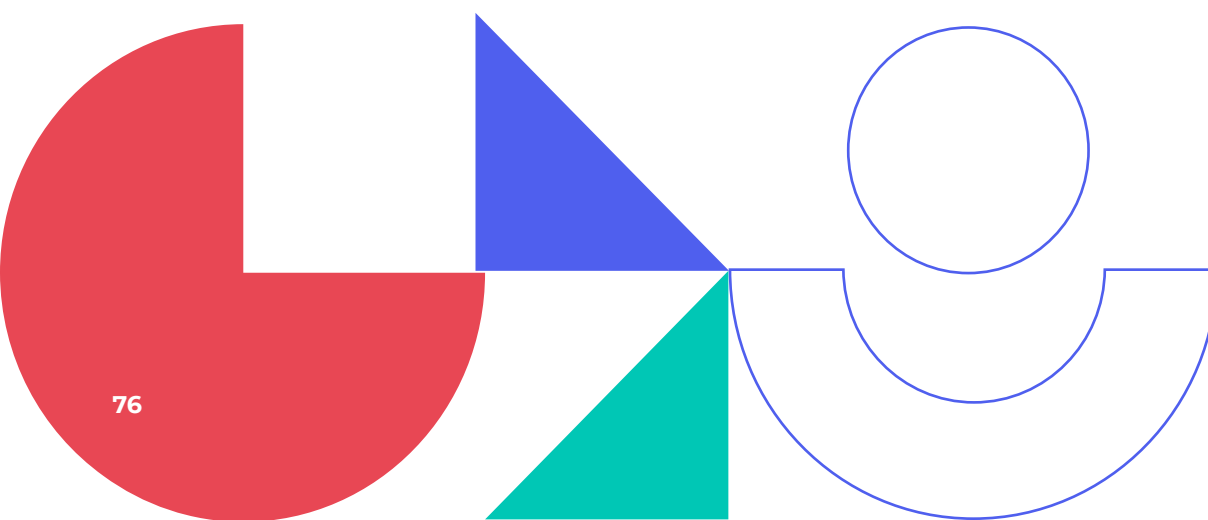
- Tutoring was most often sought out when children found a subject difficult (42%)

- Lack of motivation and the impact of the lockdown was the second biggest reason for tutoring

- 64% of tutoring was for Maths, by far the most common subject

- 62% of parents and 85% of children found value in tutoring

- 40% of children in Spain would like to have or already have a tutor



28% of children have received tutoring at some point.

16% of children received tutoring last school year vs 12% in previous years.



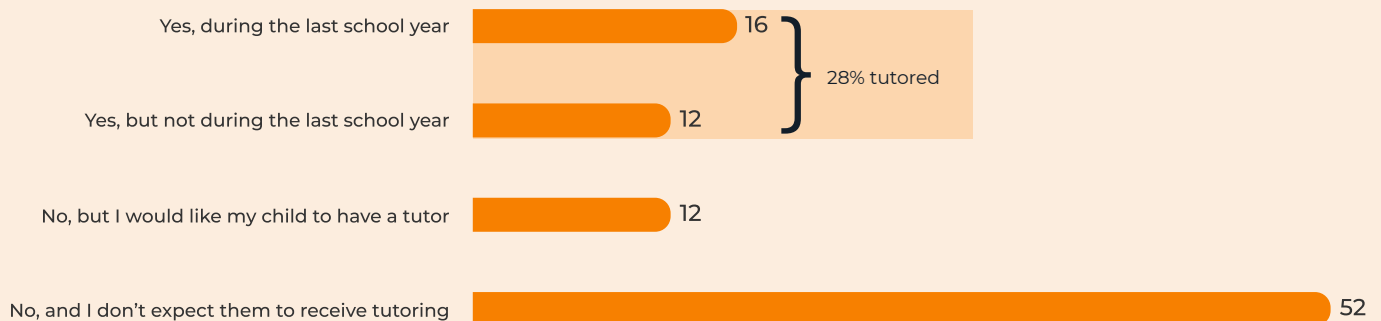
Spain leads the way with 48% of children having received tutoring at some point.



Austria (39%) and Germany (30%) are second and third in providing tutoring to their children.

Past tutoring experience – overall

Q6: Has your child ever received tutoring?



Those more likely to receive tutoring:



Boys (29%) more than girls (27%).

16-18

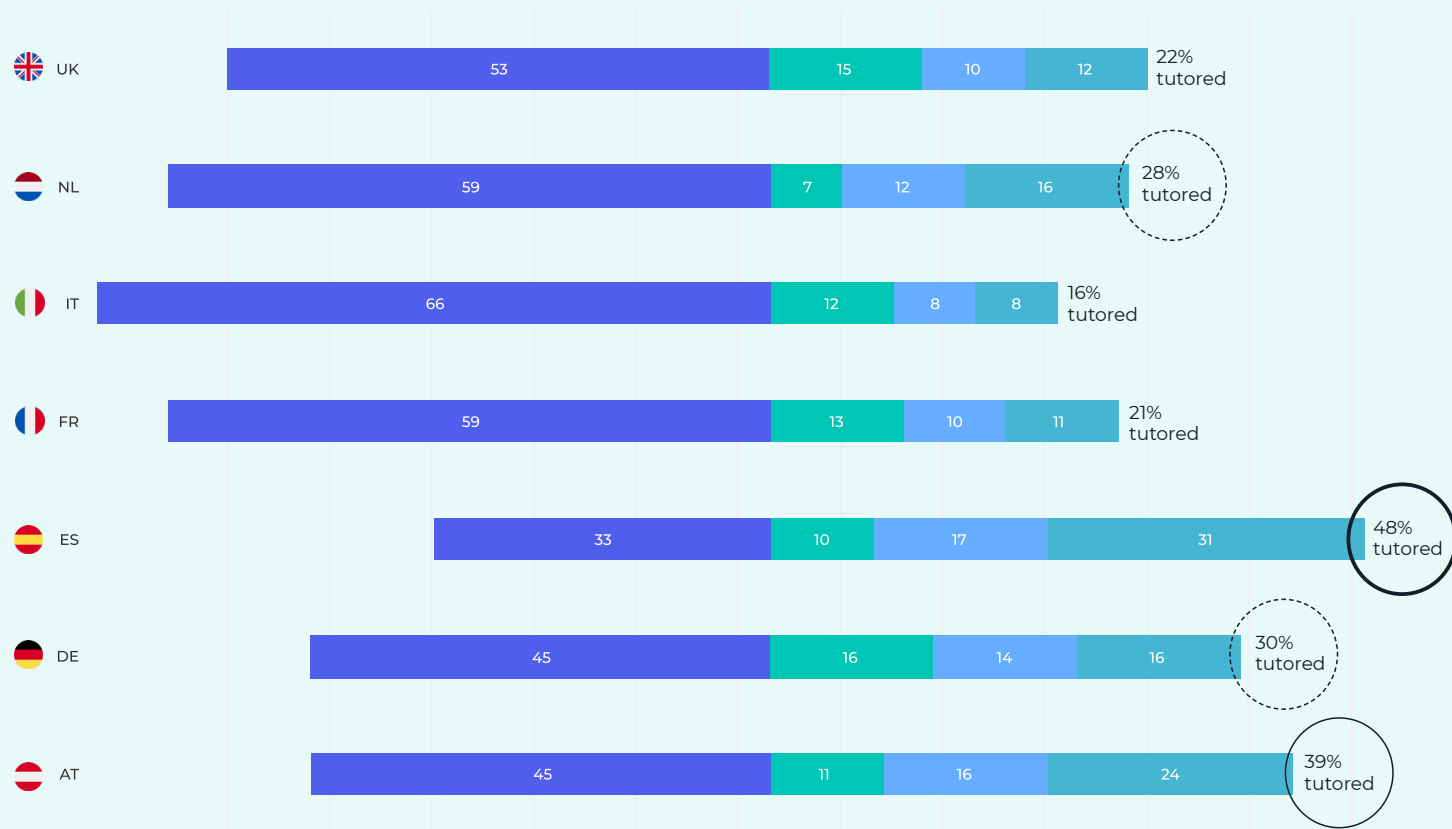
year-olds (34%) more than 13–15-year-olds (29%) and 10–12-year-olds (21%) are least likely to receive tutoring.



Children with employed parents (29%) than unemployed parents (25%).

Tutoring experience – by country (%)

- No, and I don't expect them to
- No, but I would like my child to have a tutor
- Yes, but not during the last school year
- Yes, during the last school year



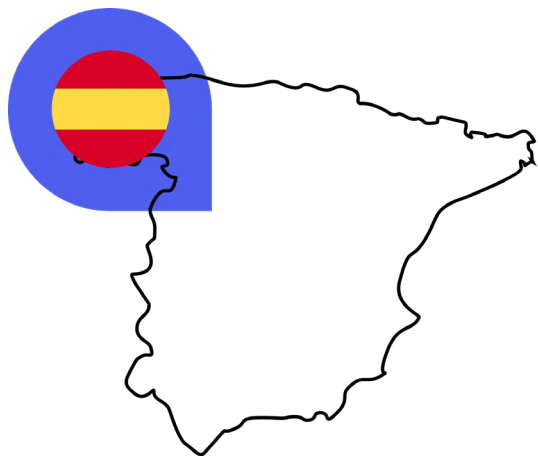
Tutoring in Europe – ranked by % significance



Overall n=6285
 Male n=3279 | Female n=2992
 10–12 n=2002 | 13–15 n=2234 | 16–18 n=2029
 Rural n=1321 | Small town n=2381 | Suburb n=1083 | City n=1481
 Employed n=4824 | Not employed n=1460
 Tutored n=968 | Not tutored n=4962

UK n=1001
 NL n=1001
 IT n=1001
 FR n=1005
 ES n=1012
 DE n=1000
 AT n=265

- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance



Spain has the highest Tutoring Index

31% Overall **14%** Online



The UK has the lowest Overall Index (12%) and a comparatively high Online Index (9%).



Austria has the second highest Overall Index (24%) but a lower Online Index (11%).



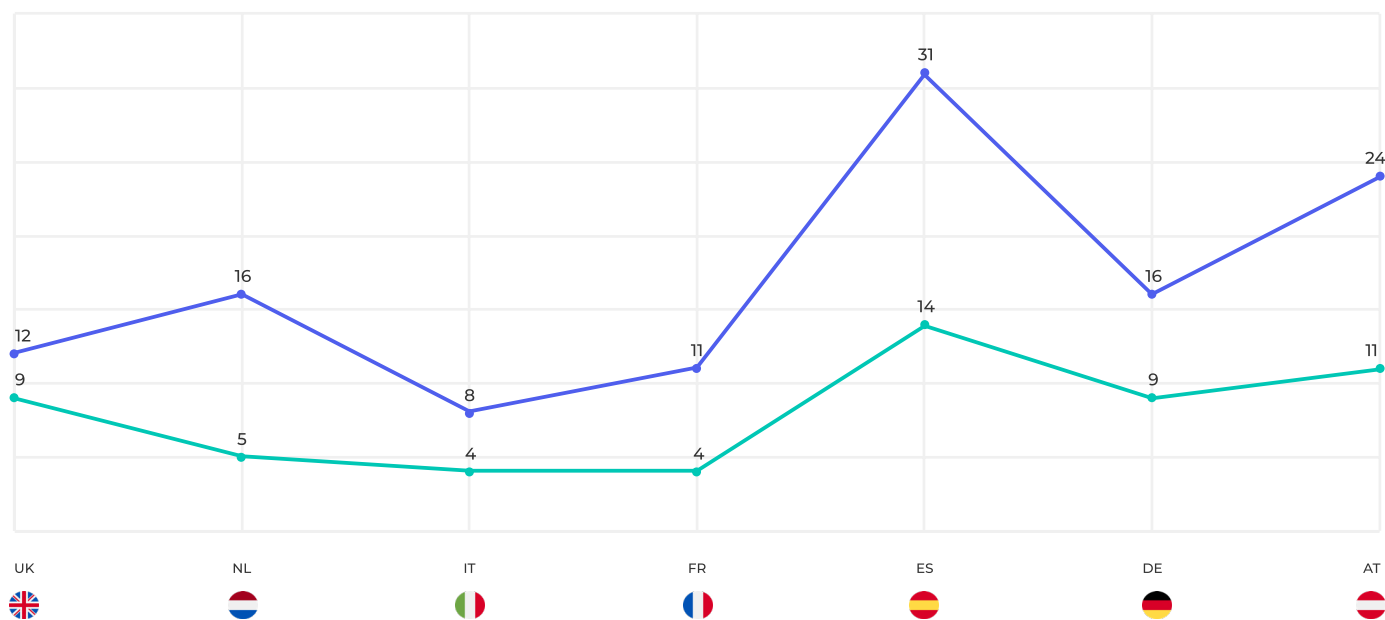
Italy has the lowest Overall (8%) and Online (4%) Index.

Tutoring Index (%) – Overall (16%) & Online (8%)

Q9: During the last school year, did your child receive any support beyond what was provided by the school?

Overall = Any tutoring selected/Online Tutoring Index = Any online selected

● Overall Tutoring Index
● Online Tutoring Index



86% of children receive tutoring once or a few times a week.

42% / 44%

There is an equal split between once a week (42%) and a few times a week (44%).



Germany (57%) and the Netherlands (55%) skew towards sessions once a week.



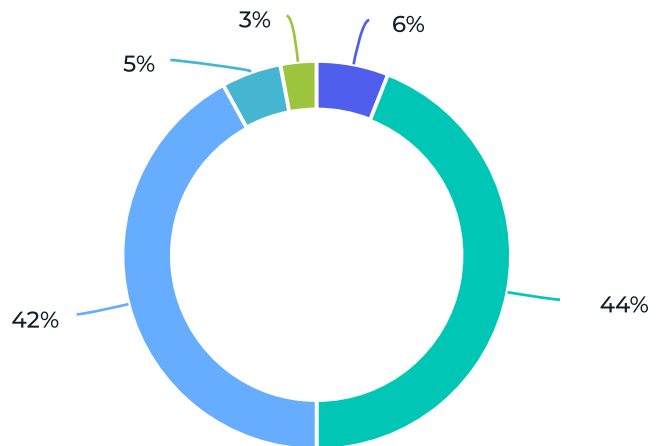
Spain (67%) has the largest number of students receiving tutoring a few times a week.

Frequency of tutoring (%)

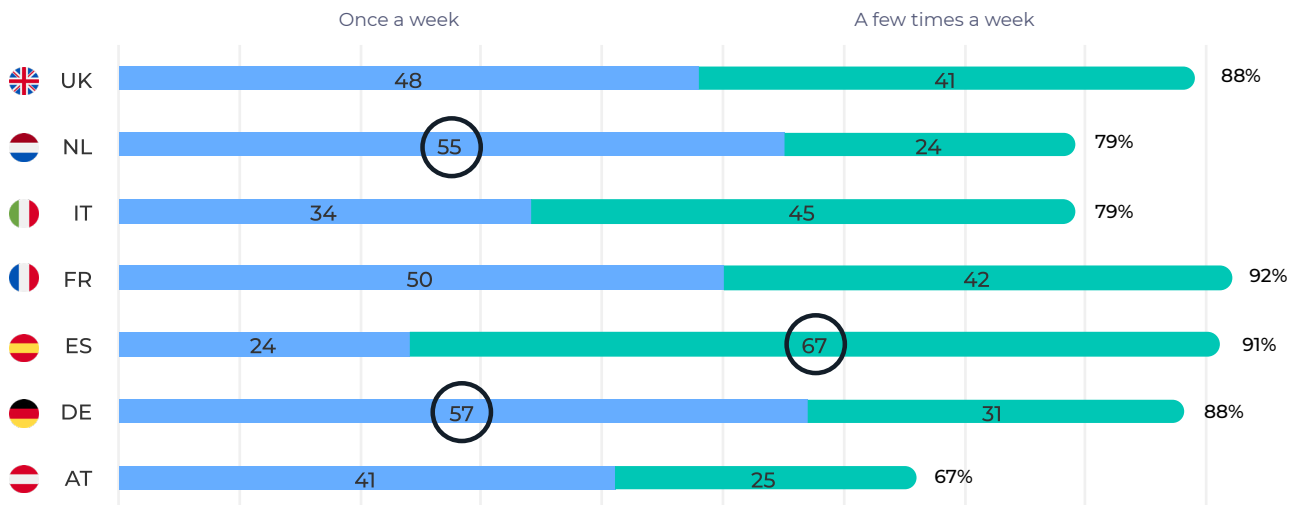
Q33: How often were the tutoring sessions?

Overall

- Daily
- A few times a week
- Once a week
- Every 2 weeks
- Just before an exam



By country



Overall n=6285
Tutored n=1001
UK n=1001 | NL n=1001 | IT n=1001 | FR n=1005 | ES n=1012 | DE n=1000 | AT n=265

- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance

47% of tutoring sessions last 60 minutes.



The UK (62%) and Spain (58%) skew most towards 60-minute sessions.



Germany has an equal mix of session lengths between 90, 60 and 45 minutes.

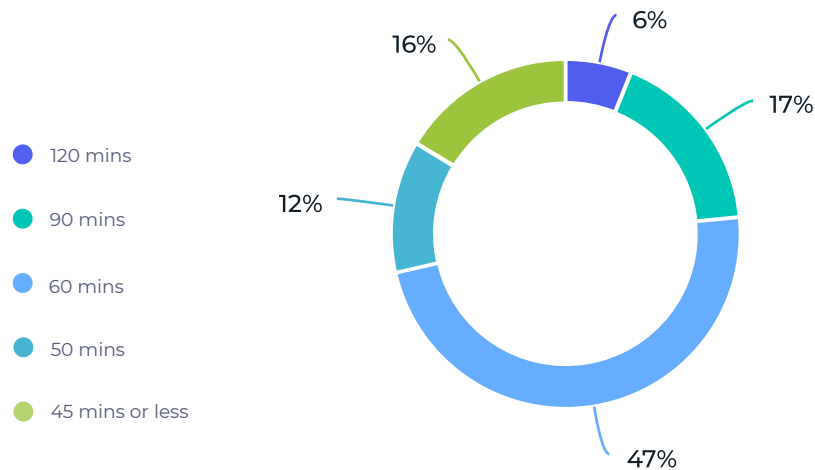


The Netherlands has the largest number receiving the shortest session lengths (28%).

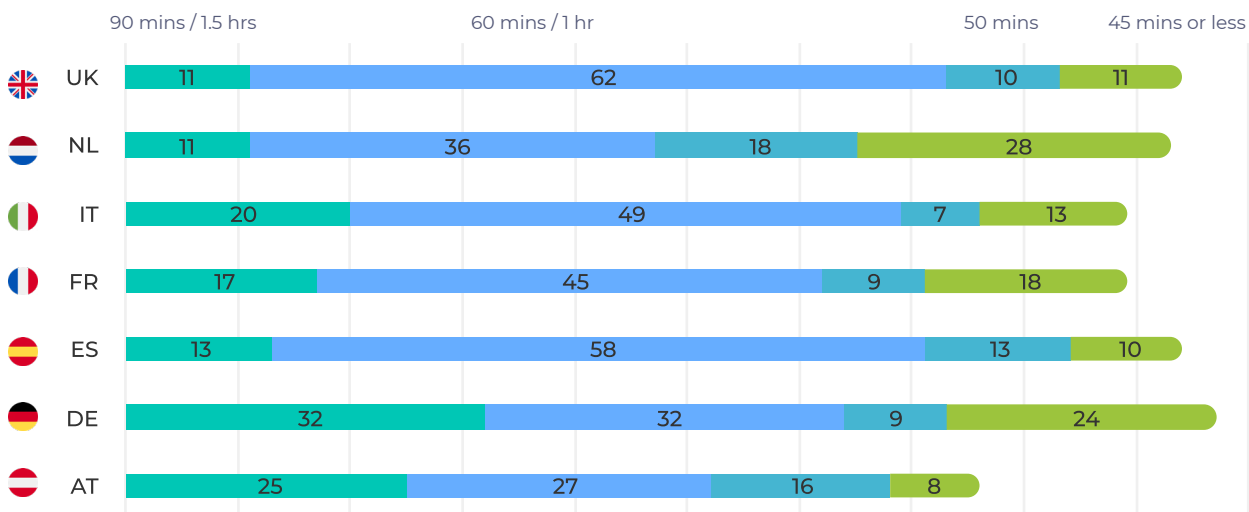
Length of tutoring (%)

Q33: How long were the tutoring sessions?

Overall



By country



Overall n=6285
 Tutored n=1001
 UK n=1001 | NL n=1001 | IT n=1001 | FR n=1005 | ES n=1012 | DE n=1000 | AT n=265

Parents (42%) and children (60%) agree that the biggest reason for tutoring is to receive help with a subject.

42%

Tutoring was most often sought out when children found a subject difficult.

28%

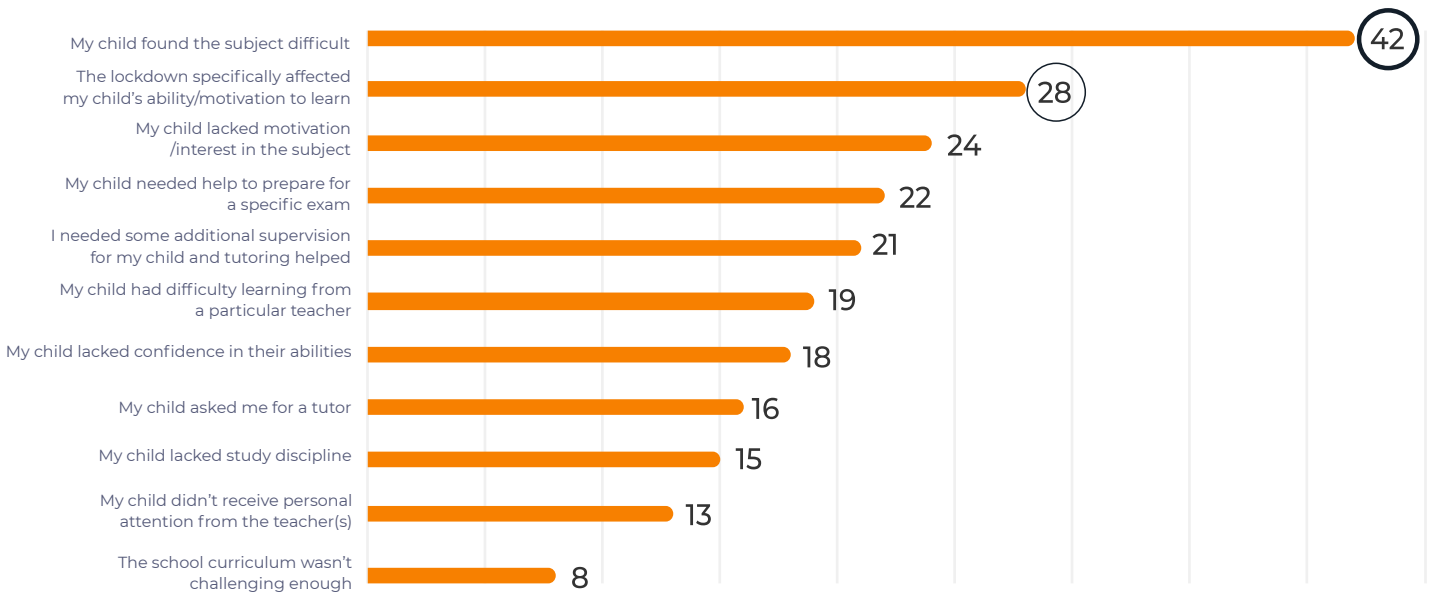
Lack of motivation and ability to learn due to the lockdown was the second reason.

48%

Children believe that tutoring helped them achieve better grades.

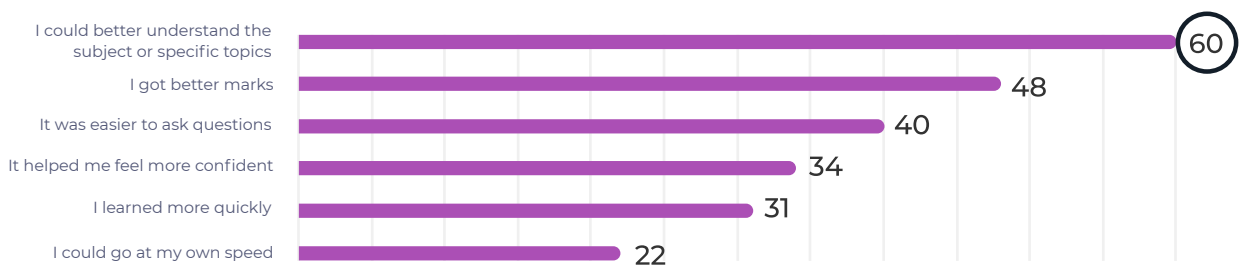
Reasons to invest in tutoring – parents’ view (%)

Q29: Please select all the reasons why your child received tutoring.



Reasons to invest in tutoring – children’s view (%)

Q55: What did your tutor help you with?



- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance

Some of the top reasons to hire a tutor differed according to country.



The Netherlands and Spain (52%) were most likely to hire a tutor for children who found a subject difficult.



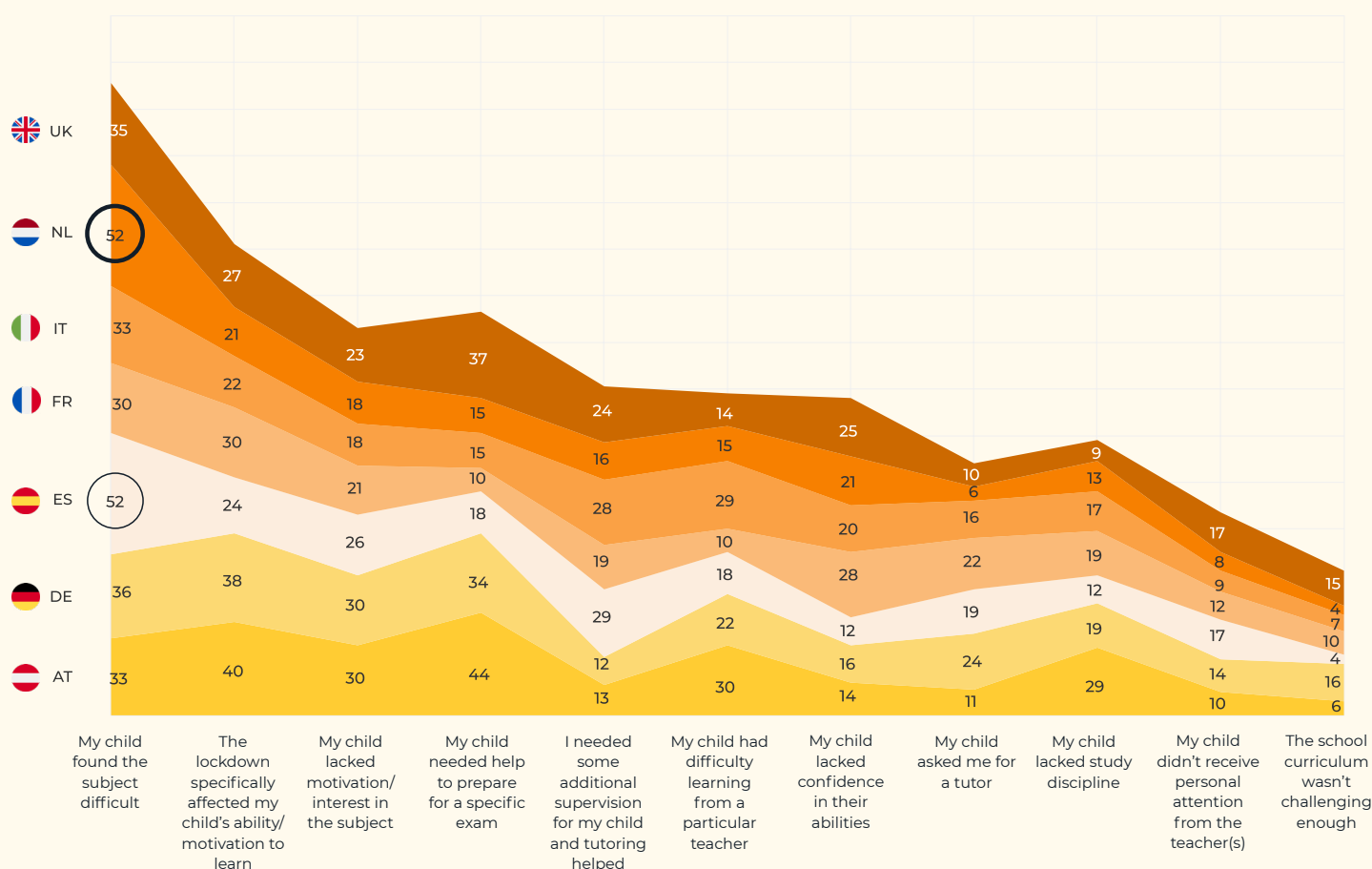
Austria (44%), the UK (37%), Germany (34%) all cited tutoring for a specific exam as a top reason.



Tutoring for additional supervision was a second priority in Spain (29%) and third in Italy (28%).

Reasons for tutoring – by country (%)

Please select all the reasons why your child received tutoring *in order of overall importance*.



Overall n=6285

Tutored n=1001

UK n=1001 | NL n=1001 | IT n=1001 | FR n=1005 | ES n=1012 | DE n=1000 | AT n=265

- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance

The reasons children received tutoring matches their expectations.

60%

gained a better understanding of the subject through tutoring.

49%

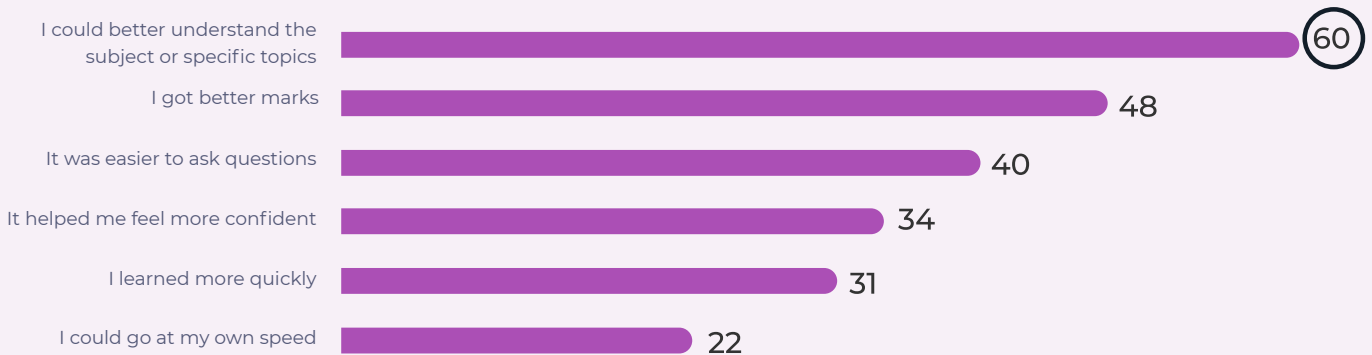
expect tutoring to help them understand subject material better.

2nd

Getting better marks, followed by asking questions, fall into second and third place.

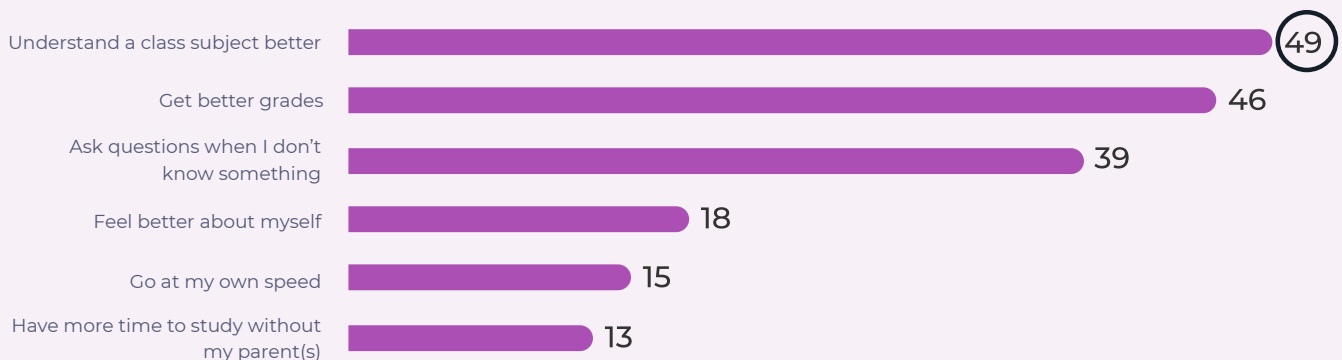
Reasons to invest in tutoring (%)

Q55: What did your tutor help you with?



Tutoring help – overall expectations (%)

Q52: What do you think a tutor can help you with? A tutor could help me...



Overall n=6285
 Tutored n=1001
 UK n=1001 | NL n=1001 | IT n=1001 | FR n=1005 | ES n=1012 | DE n=1000 | AT n=265

○ 1 Greatest significance
 ○ 2 Second place significance
 ○ 3 Third place significance

64% of tutoring received was for Maths, by far the most tutored subject.



English (30%) was the second most common subject for tutoring.



Parents and children cited the same top tutored subjects.



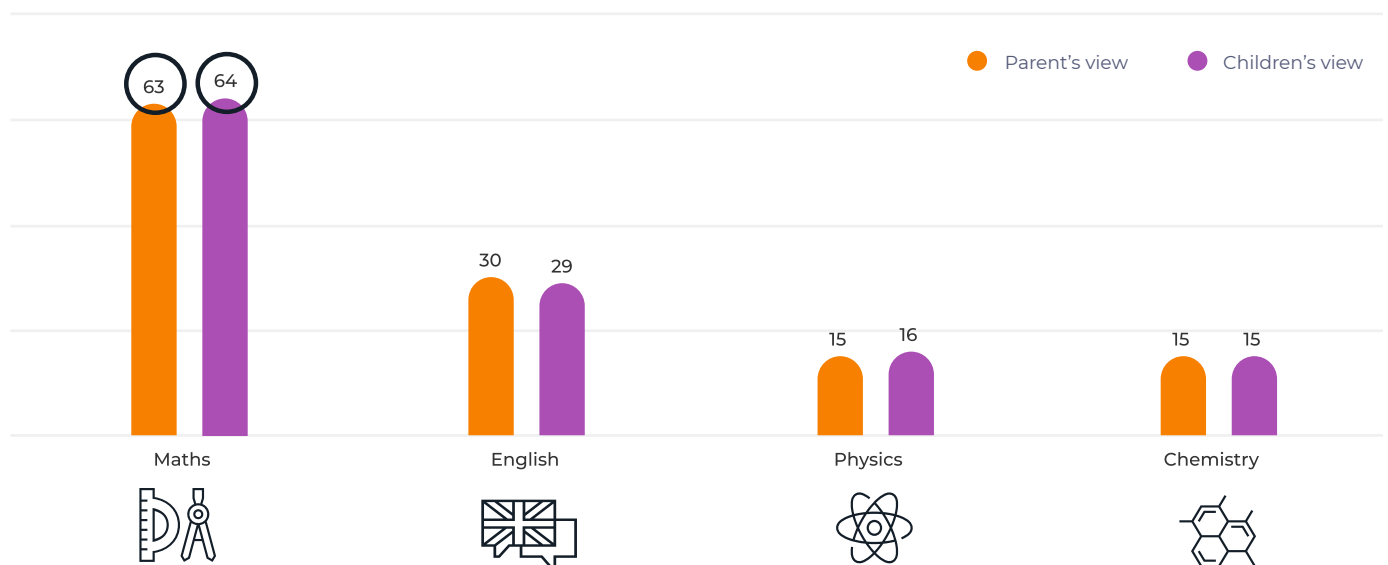
Children received tutoring for the same subjects in which they experienced learning gaps.

Top tutored subjects - overall

Parents: In which subject(s) did your child receive tutoring?

Children: Q53: What subject(s) did your tutor help you with?

Top 4 subjects. All other subjects were significantly lower, under 10%.



Boys and girls were tutored equally across the top subjects.

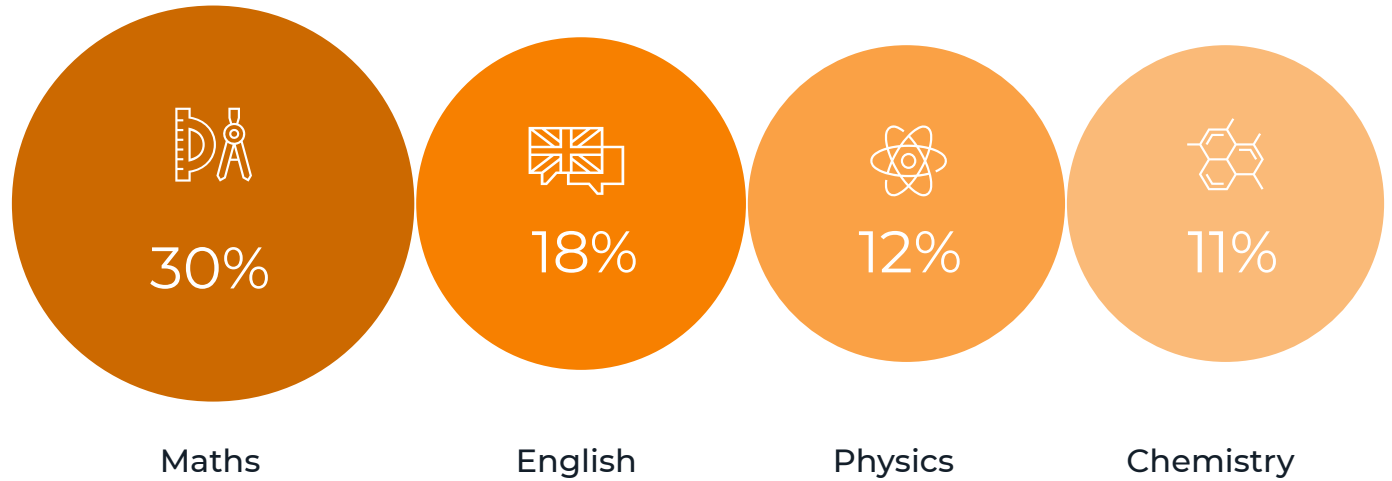
Even though girls experienced more of a learning gap in Maths (31%), there was an equal percentage of both genders receiving Maths tutoring (62% of boys and 66% of girls).

Overall n=6285
 Tutored n=1001
 Tutored (children's survey) n=941
 TUTORED: UK n=1001 | NL n=1001 | IT n=1001 | FR n=1005 | ES n=1012 | DE n=1000 | AT n=265
 TUTORED CHILDREN: UK n=113 | NL n=78 | IT n=82 | FR n=97 | ES n=297 | DE n=152 | AT n=56

○ 1 Greatest significance
 ○ 2 Second place significance
 ○ 3 Third place significance

Reference: learning gap – by subject (%)

Please select any of the subjects below where your child experienced any learning gaps during the last school year (2020–2021).
Top 4 subjects. All other subjects were significantly lower at 9% or less.



Maths was cited as the most tutored subject across all countries.



Students in France (40%) and the UK (39%), followed by Austria (35%), received the most tutoring in their native language.



Students in Spain were the largest group to receive English tutoring as a foreign language (38%).

Country snapshots:



Spain, the leader in tutoring (48%), has the highest percentage of students receiving tutoring across all subjects.



Students in the Netherlands receive most of their tutoring in Maths (64%). English tutoring is lower than the overall average (12%).



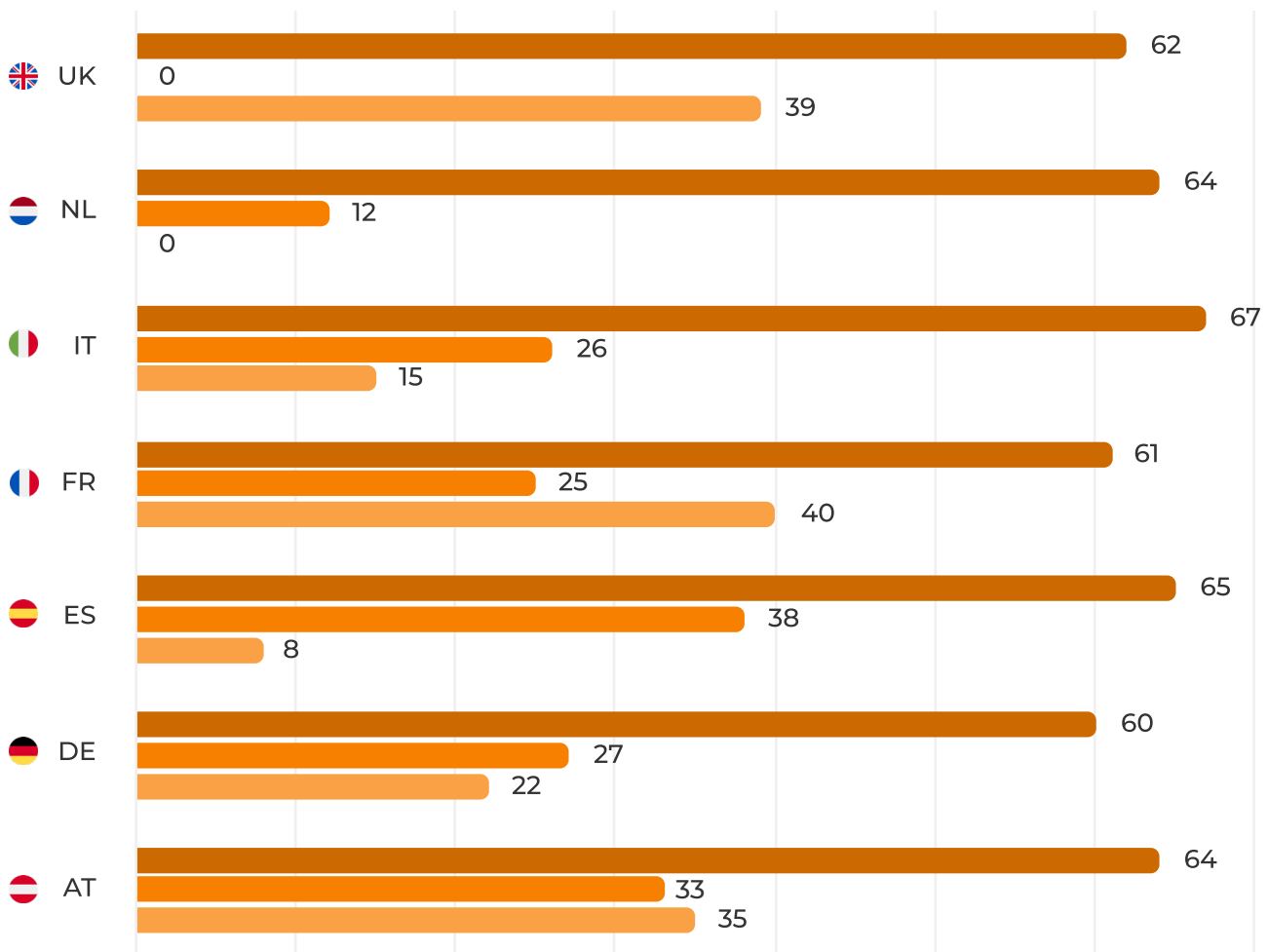
Students in the UK (39%) and Austria (35%) receive the most tutoring in their native language.

Top tutored subjects – by country (%)

Parents: Q30: In which subject(s) did your child receive tutoring?

Top 4 subjects. All other subjects were significantly lower, under 10% and/or a small base, n <25.

- Maths
- English as a foreign language
- Native language



Overall (Parents) n=6285
 Tutored (parents) n=986
 TUTORED: UK n=120 | NL n=159 | IT n=82 | FR n=106 | ES n=315 | DE n=161 | AT n=63

Most students received tutoring from a freelance tutor (split between online and in-person).



Students in the Netherlands received more than 50% of tutoring at school.



Tutoring from freelance tutors skews towards online.

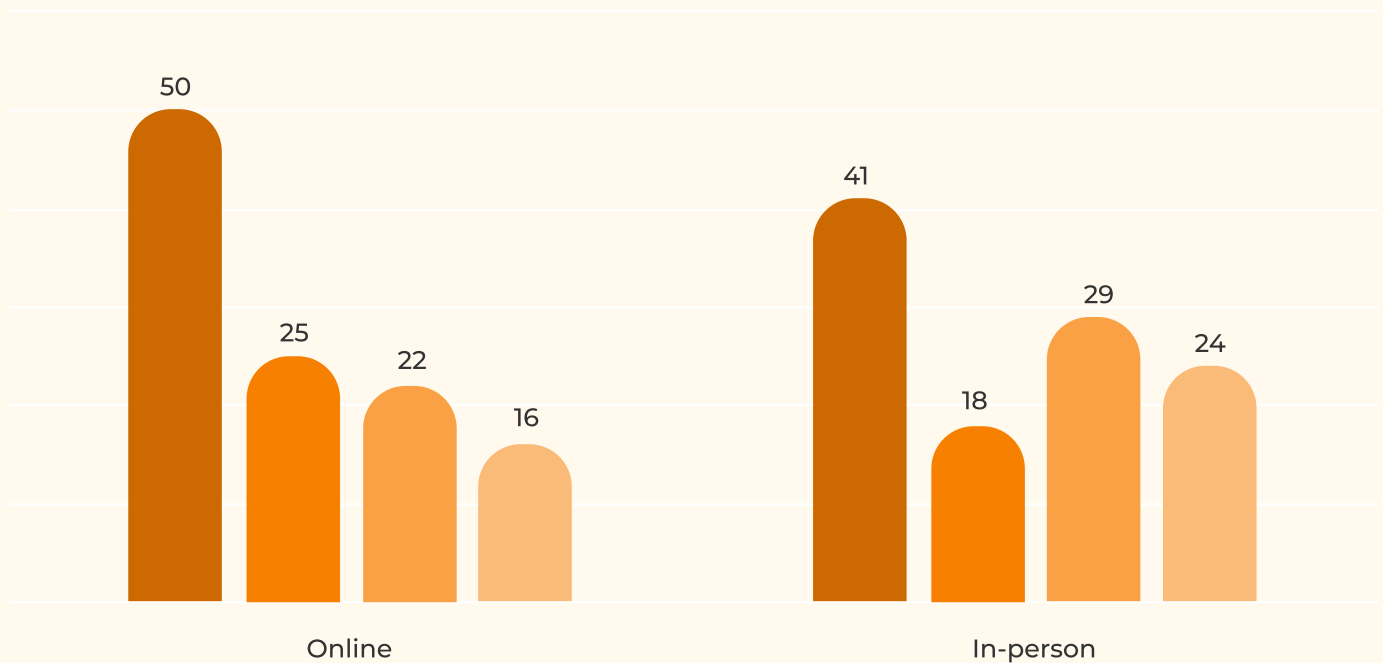


Tutoring online from an institute is highest in Germany (over 40%).

Tutoring Source (%)

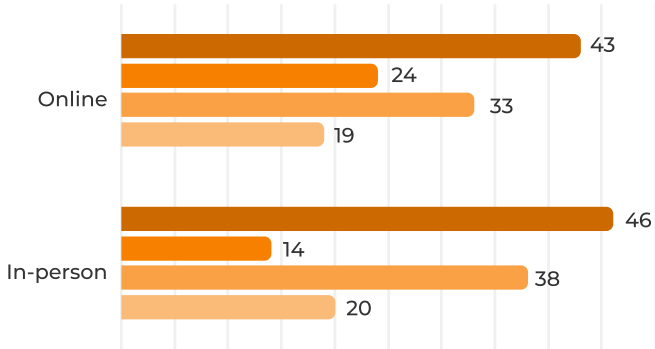
From whom did your child receive tutoring during the last school year?

- Freelance tutor
- At an institute/tutoring company
- At school
- From a friend/family member

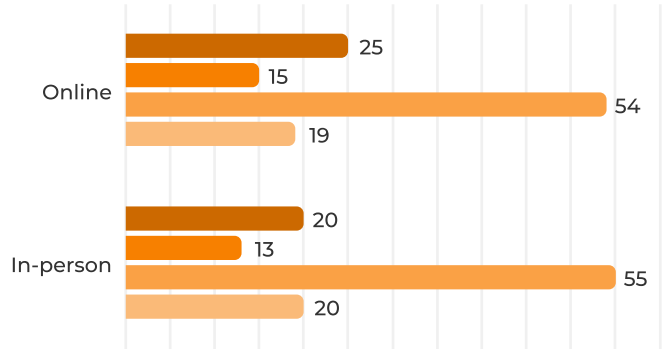


- Freelance tutor
- At an institute/tutoring company
- At school
- From a friend/family member

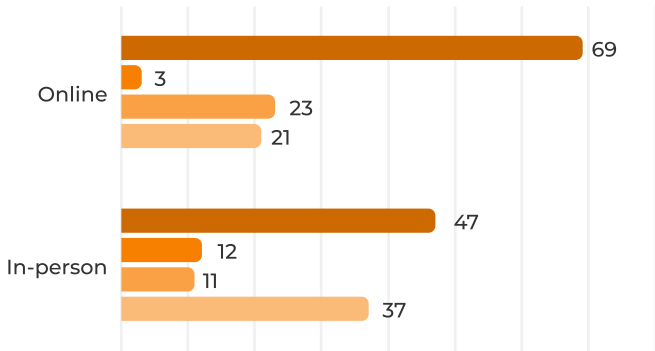
 **UK**



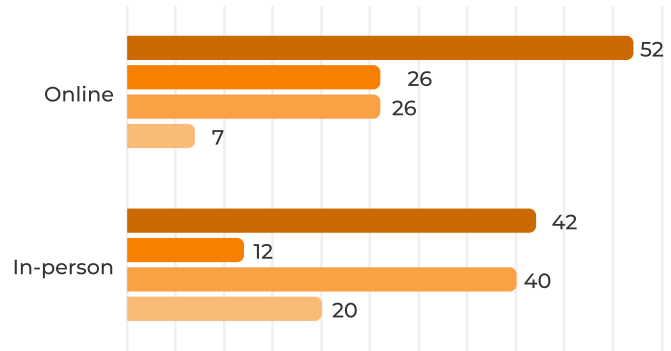
 **NL**



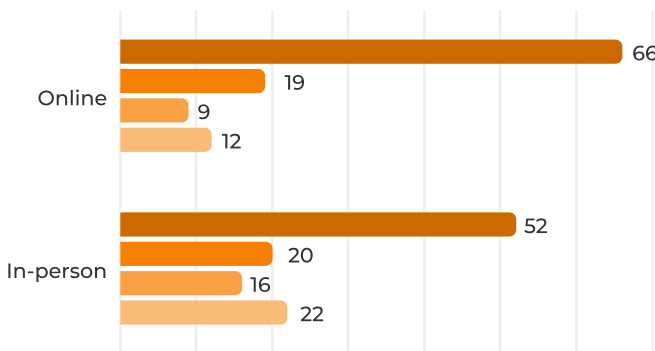
 **IT**



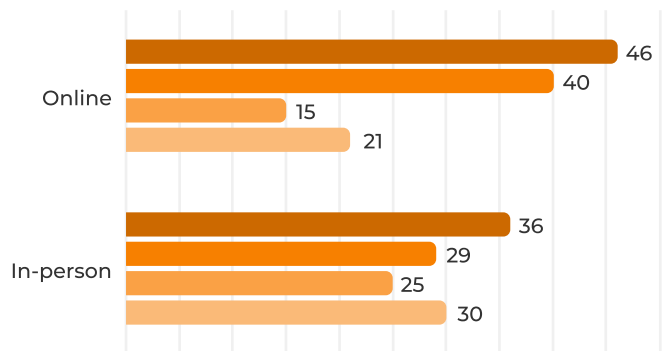
 **FR**



 **ES**



 **DE**



AT excluded, low base

The cost of tutoring varies across countries.



The UK has the highest cost of tutoring per session (€34 = £28).



The Netherlands has the cheapest tutoring cost per session (€15).

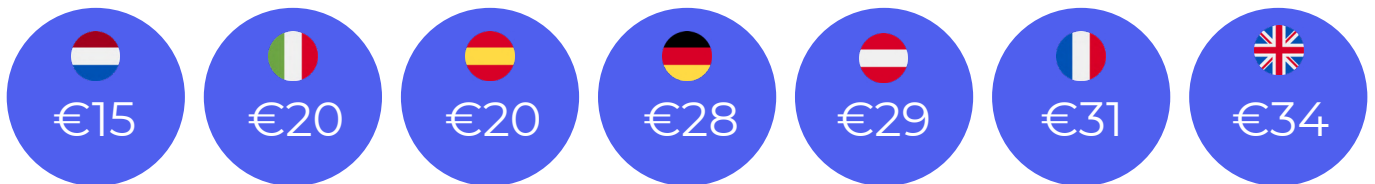


Italy and Spain are the second cheapest (€20 per session).

Cost of tutoring – by country

Approximately how much did you pay per session?

Cost for UK is converted from GBP to EUR



Tutoring Intention, Desire and Value

Tutoring Intention

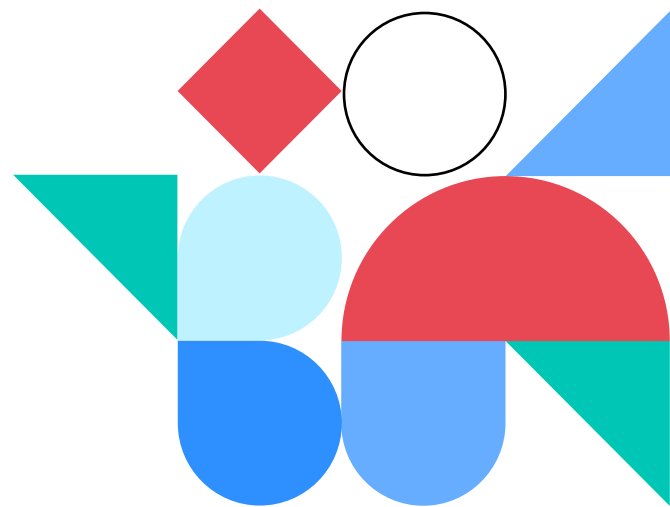
Tutoring Intention refers to the parents that plan to provide tutoring for their children during the current academic year.

Tutoring Desire

Tutoring Desire describes the wish of children to receive tutoring during the current academic year.

Tutoring Value

Tutoring Value describes the kind of support that parents and children attribute to tutoring, based on their own experiences.



62% of parents and 85% of children found value in tutoring.



Children found more value (85%) than their parents (62%).



Children in the UK found the most value (96%).



Parents in the Netherlands found the least value (43%).

Tutoring value – overall (%)

Parents: Q31: Overall, how much do you think the tutor/tutoring school supported your child?

Children: Q54: To what extent do you think your tutor helped you?

Results TBC: Parents – Much more / Somewhat more than expected. Children – A lot / Somewhat.



Parents' view



Children's view



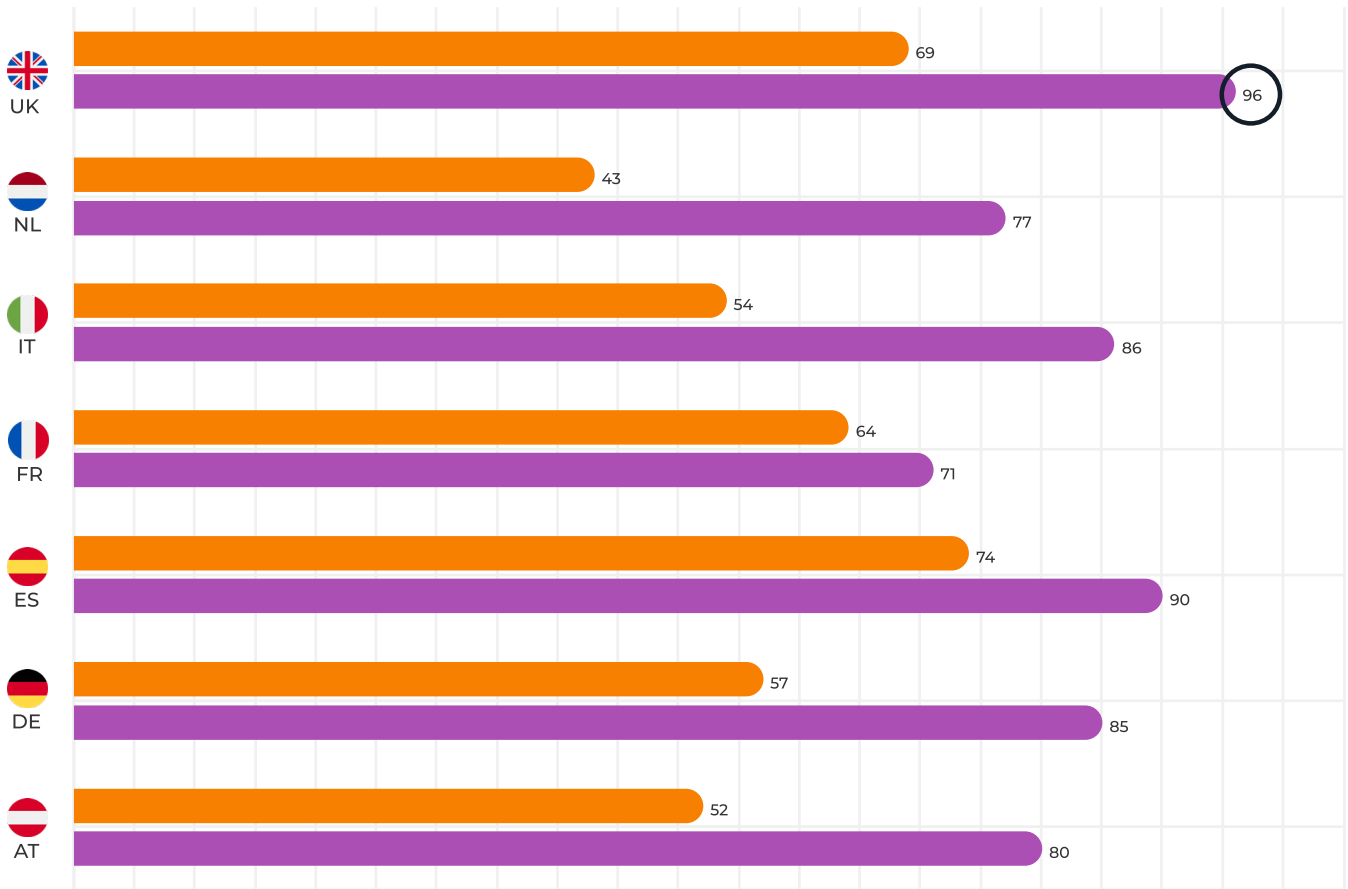
Girls (88%) were more satisfied than boys (83%).

16-18

year-olds (89%) were more satisfied than 10–15 year-olds (83%).

Tutoring value – by country (%)

● Parent's view ● Children's view



Parents were most satisfied in Spain (74%), followed by the UK (69%).

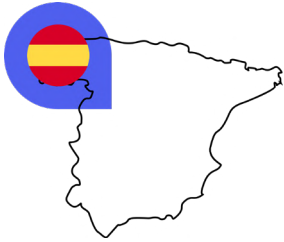


The biggest difference between parents' and children's satisfaction was in the Netherlands (34%) and Italy (32%).

Overall n=6285
 Tutored n=1006
 TUTORED: UK n=120 | NL n=159 | IT n=82 | FR n=106 | ES n=315 | DE n=161 | AT n=63

- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance

29% of parents intend to provide tutoring for their children this year.



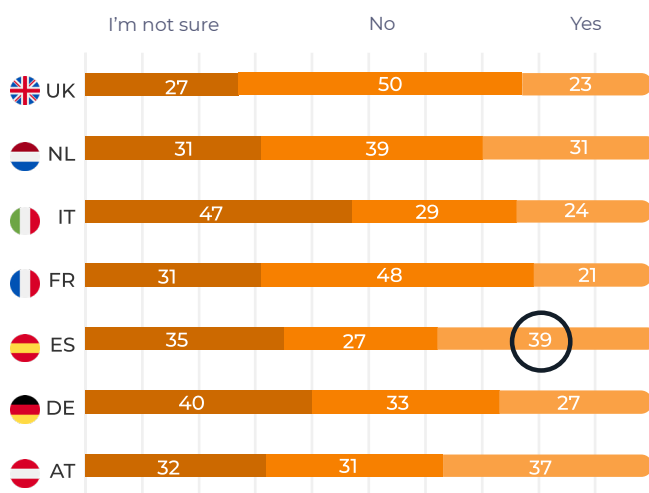
Parents in Spain are the most likely to consider tutoring for this school year (39%).



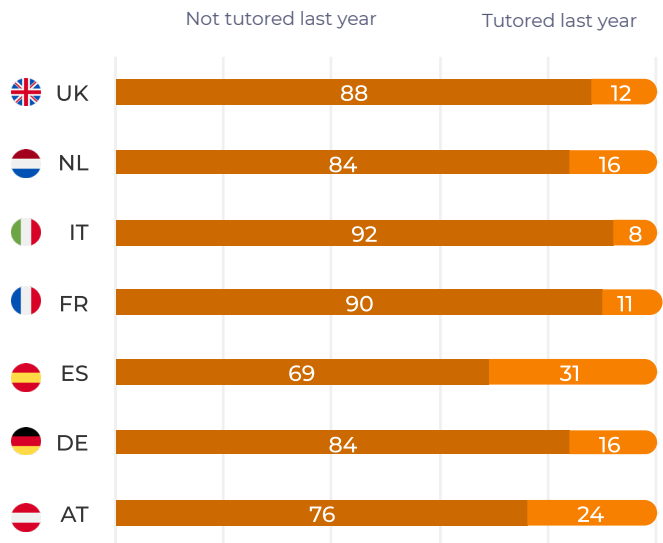
Although only 23% of parents in the UK plan to get tutoring, they have the highest intention to get online tutoring (20%).

Tutoring Intention (%)

Q27: Thinking about this school year (2021–2022), will your child receive tutoring? (%)



Reference: tutoring by country last year (%)



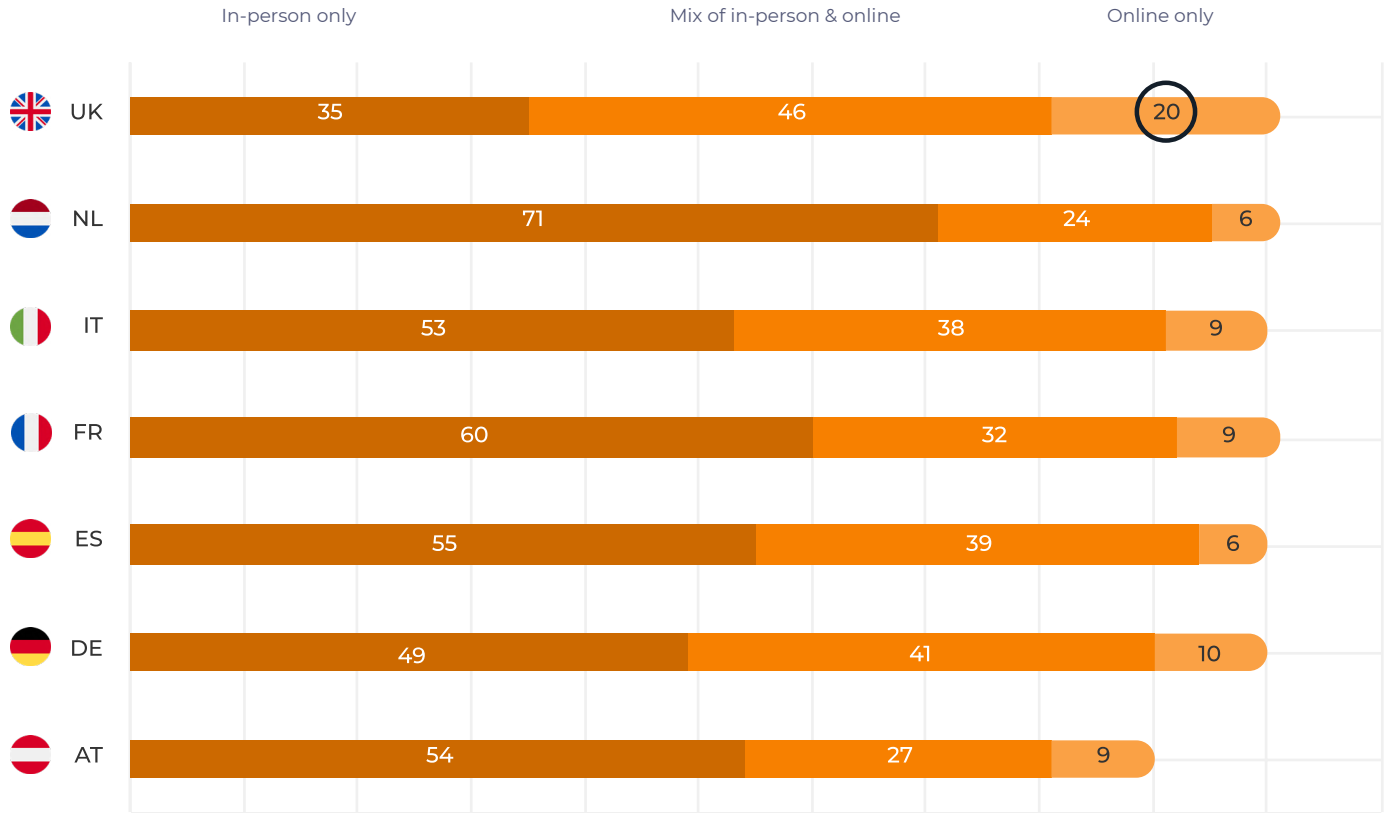
Overall n=6285
 Children n=5767
 UK, n=1001
 NL, n=1001IT, n=1001FR, n=1005ES, n=1012DE, n=1000AT, n=265

○ 1 Greatest significance
 ○ 2 Second place significance
 ○ 3 Third place significance

Tutoring Intention – preferred method (%)

Q28: Where do you imagine your child would be tutored?

Base: Those who said yes to tutoring in the future.



Overall n=6285
 Children n=5767
 UK n=1001 | NL n=1001 | IT n=1001 | FR n=1005 | ES n=1012 | DE n=1000 | AT n=265
 Children: UK n=889 | NL n=930 | IT n=974 | FR n=899 | ES n=952 | DE n=886 | AT n=237

- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance

48% of children in Spain would like to have, or already have a tutor.



23% of children in Spain already have a tutor – double the amount in the rest of Europe.



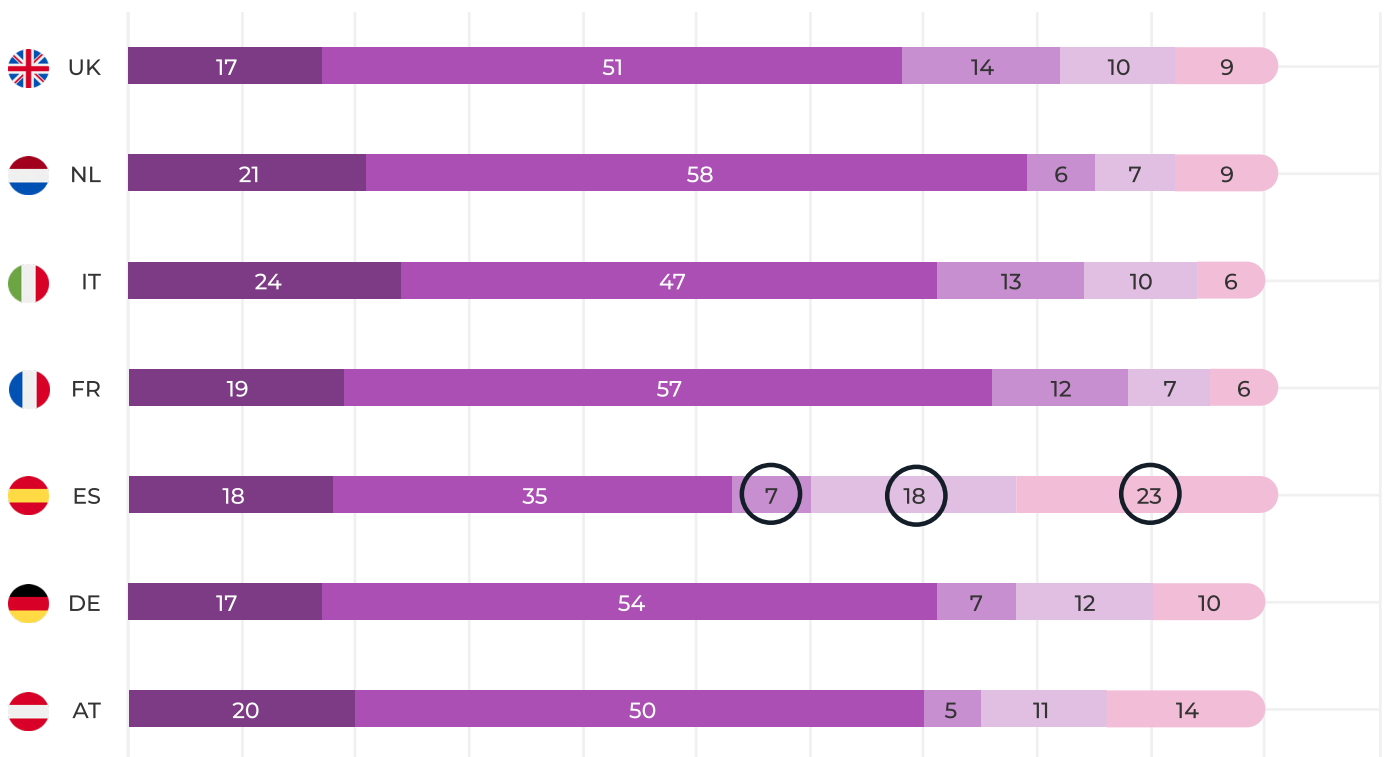
Children in the Netherlands (58%) and France (57%) don't want a tutor*

*are less likely to want one compared to children in Austria (50%), Italy (47%), the UK (51%) and Spain (50%)

Tutoring Intention – preferred method (%)

Children: Q56: Would you like to have a tutor this school year?

- I don't know
- No, I don't want one
- Yes, but I don't think I will be able to get one
- Yes, but I don't have one yet
- Yes, I have one already



Overall n=6285
 Children n=5767
 UK n=1001 | NL n=1001 | IT n=1001 | FR n=1005 | ES n=1012 | DE n=1000 | AT n=265
 Children: UK n=889 | NL n=930 | IT n=974 | FR n=899 | ES n=952 | DE n=886 | AT n=237

- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance

10

Learning Preferences



On average, students spent **18 hours** a week on education outside the classroom.

21hrs

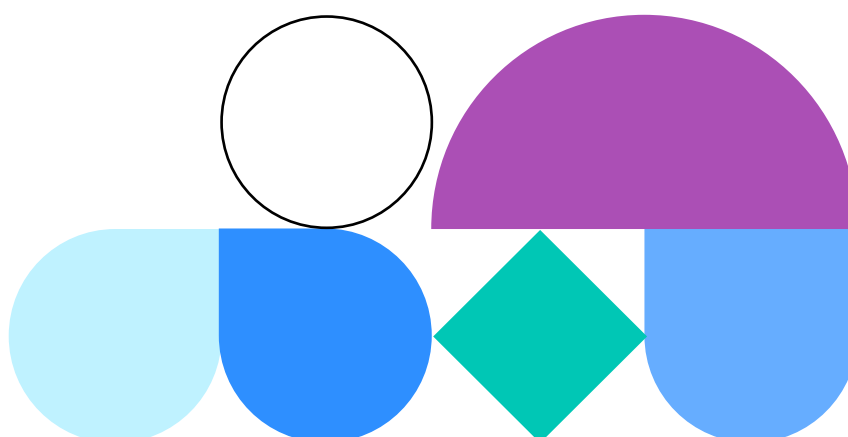
Students in Italy spend the most time on education outside class time (21 hours per week).

- Students in the Netherlands spend the least amount of time on education outside the classroom (14 hours per week)
- Girls (18 hours) spend more time than boys (17 hours) on education
- 16–18-year-olds (19 hours) spend more time than 10–15-year-olds (17 hours)
- Students receiving online tutoring spend the most time on education (20 hours), followed by those receiving offline tutoring (19 hours) and finally those without tutoring (17 hours)

70%

of children prefer to learn in-person in a classroom.

- 10–12-year-olds show the strongest preference for in-person learning (73%)
- Children who received tutoring were more open to online and both online and in-person tutoring (43%)





Students in Italy spend the most time on education outside class time (21 hours per week).



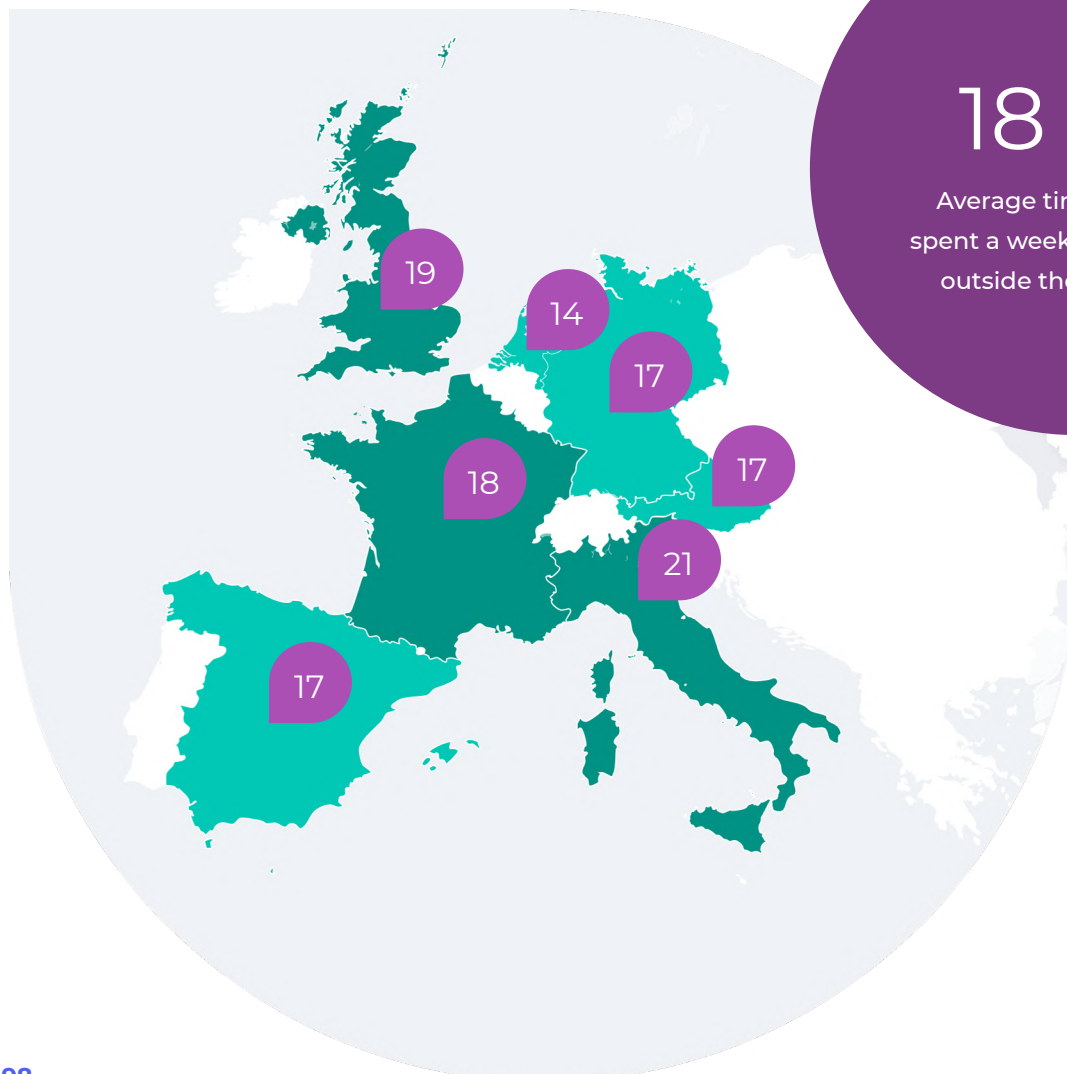
Students in the Netherlands spend the least amount of time on education outside the classroom (14 hours per week).



All other countries spend equal amounts of time on education.

Time spent on education

Approximately how much time did you spend learning or studying in a typical week? Think about all the time except the hours you were in a class (online or in-person).



18 hrs
Average time students spent a week on education outside the classroom



Girls spend more time (18 hours) than boys on education.

16-18

year-olds spend more time (19 hours) than 10–15-year-olds (17 hours).

20hrs

Students receiving online tutoring spend the most time on education (20 hours), followed by those receiving offline tutoring (19 hours) and finally those without tutoring (17 hours).

Time spent on education – by segment (%)

Approximately how much time did you spend learning or studying in a typical week? Think about all the time except the hours you were in a class (online or in-person).



Children spend **13 hours** a week on education outside class time, according to parents.



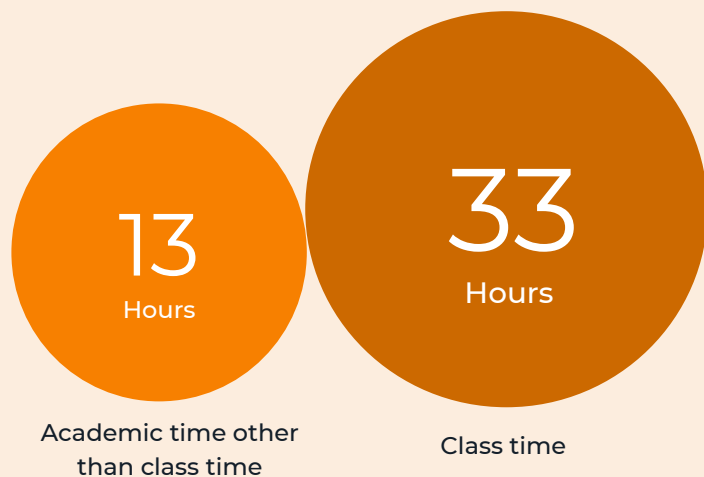
Children in Spain spend the most time on academic work outside class time (15 hours).



Children in the Netherlands (11 hours) and the UK (12 hours) spend the least amount of time on academic work outside class time.

Time spent on education – by segment

Q11: Considering a typical week during the last academic year, approximately how many hours did your child spend on their education?



70% of children prefer to learn in-person in a classroom.

10-12

10–12-year-olds (73%) show the strongest preference for in-person learning.

43%

Children who received tutoring were more open to online and both online and in-person tutoring (43%).

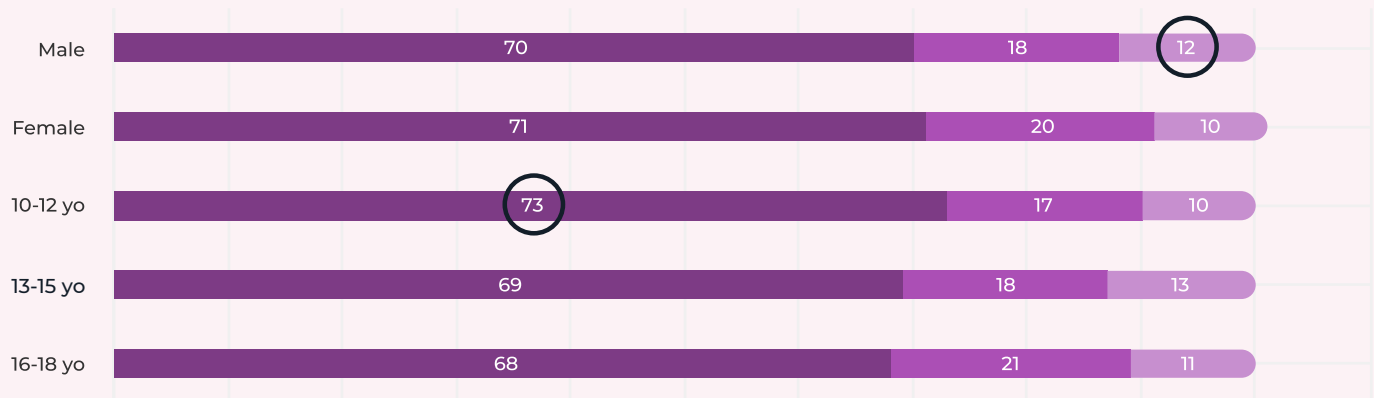
24%

Children in Spain are most open to a mix of in-person and online classes (24%).

Children’s learning preference (%)

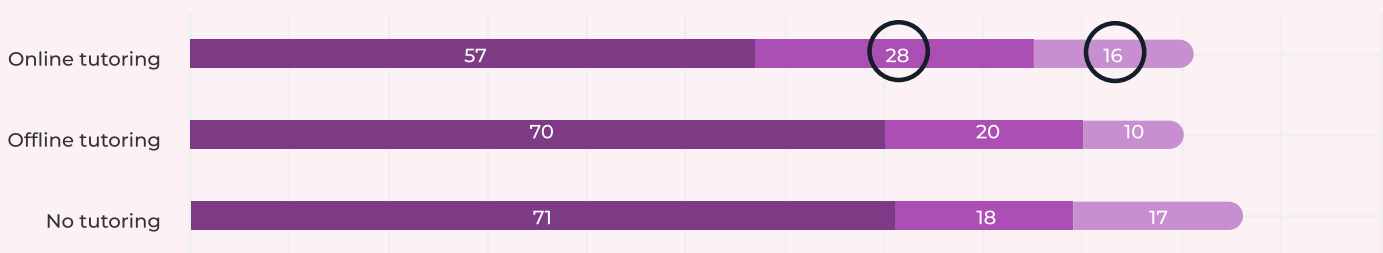
- In-person in a classroom
- Both in-person and online equally
- Online classes

What is your preferred way to learn?

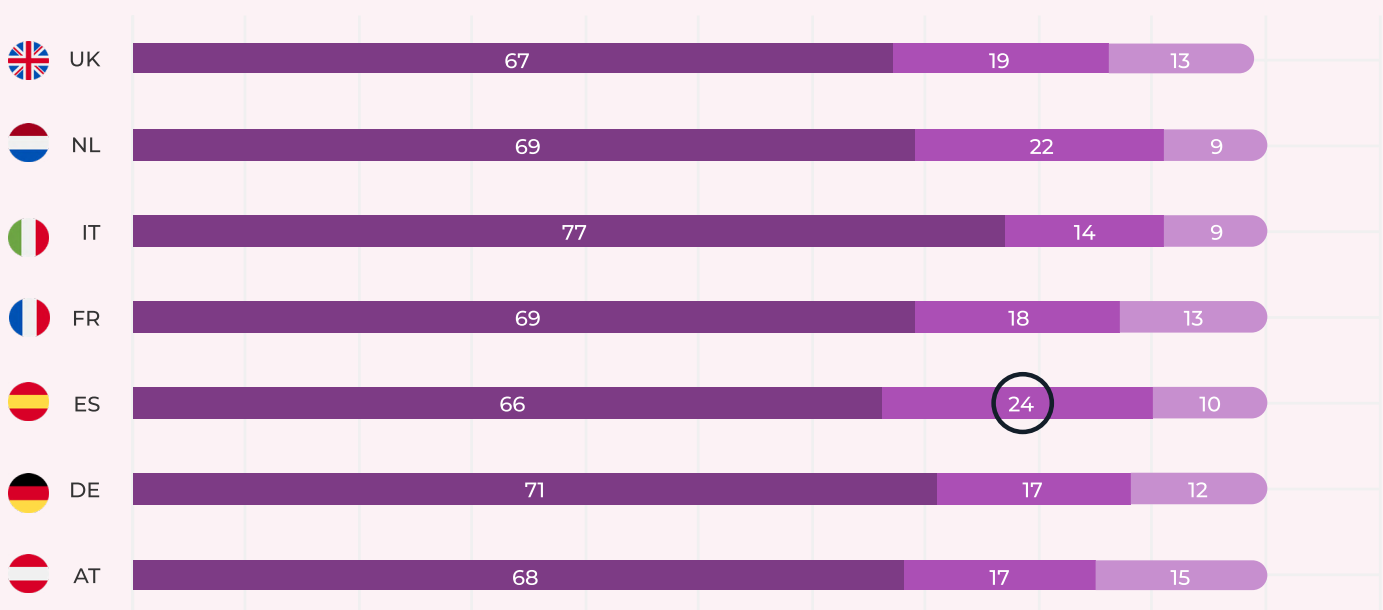


Children’s learning preference – by tutoring experience (%)

Children who received online tutoring (43%) are more open to online and both in-person and online classes equally, than those who were tutored offline (30%) or received no tutoring (29%).



Children’s learning preference – by country (%)



Overall, children n=5767
 Males (children) n=3026
 Females (children) n=2730

UK n=889 | NL n=930 | IT n=974 | FR n=899 | ES n=952 DE n=886 | AT n=237

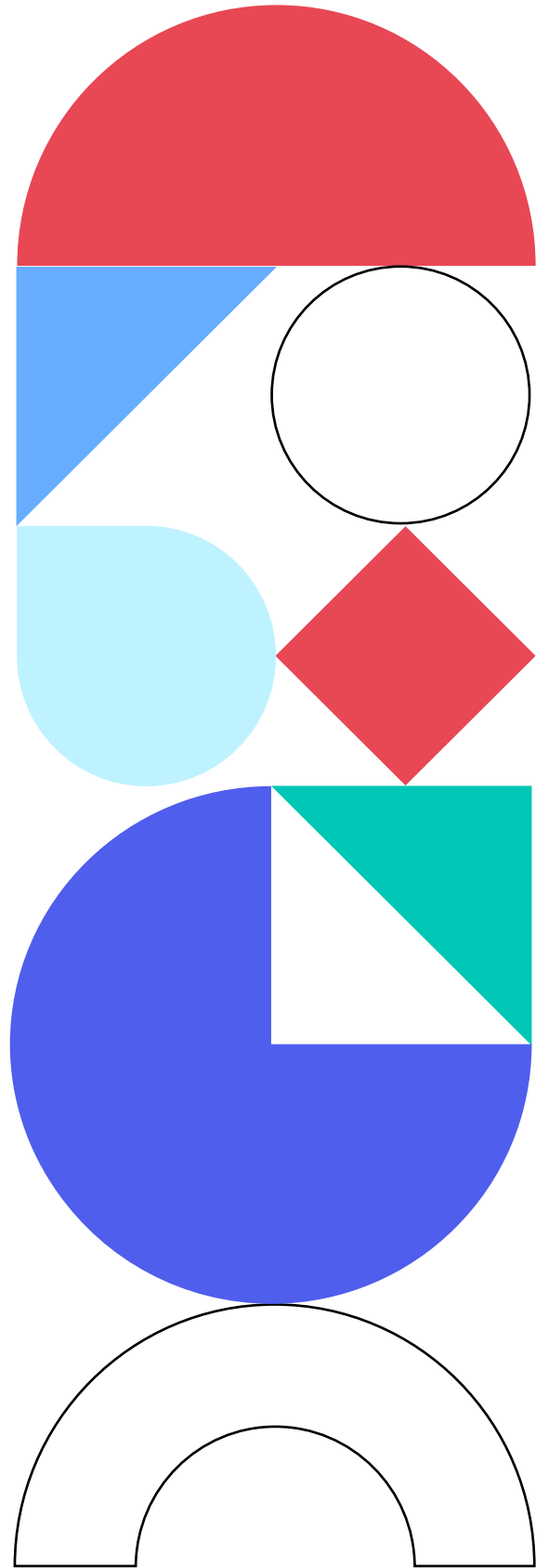
- 1 Greatest significance
- 2 Second place significance
- 3 Third place significance

Innovation favours the connected mind.

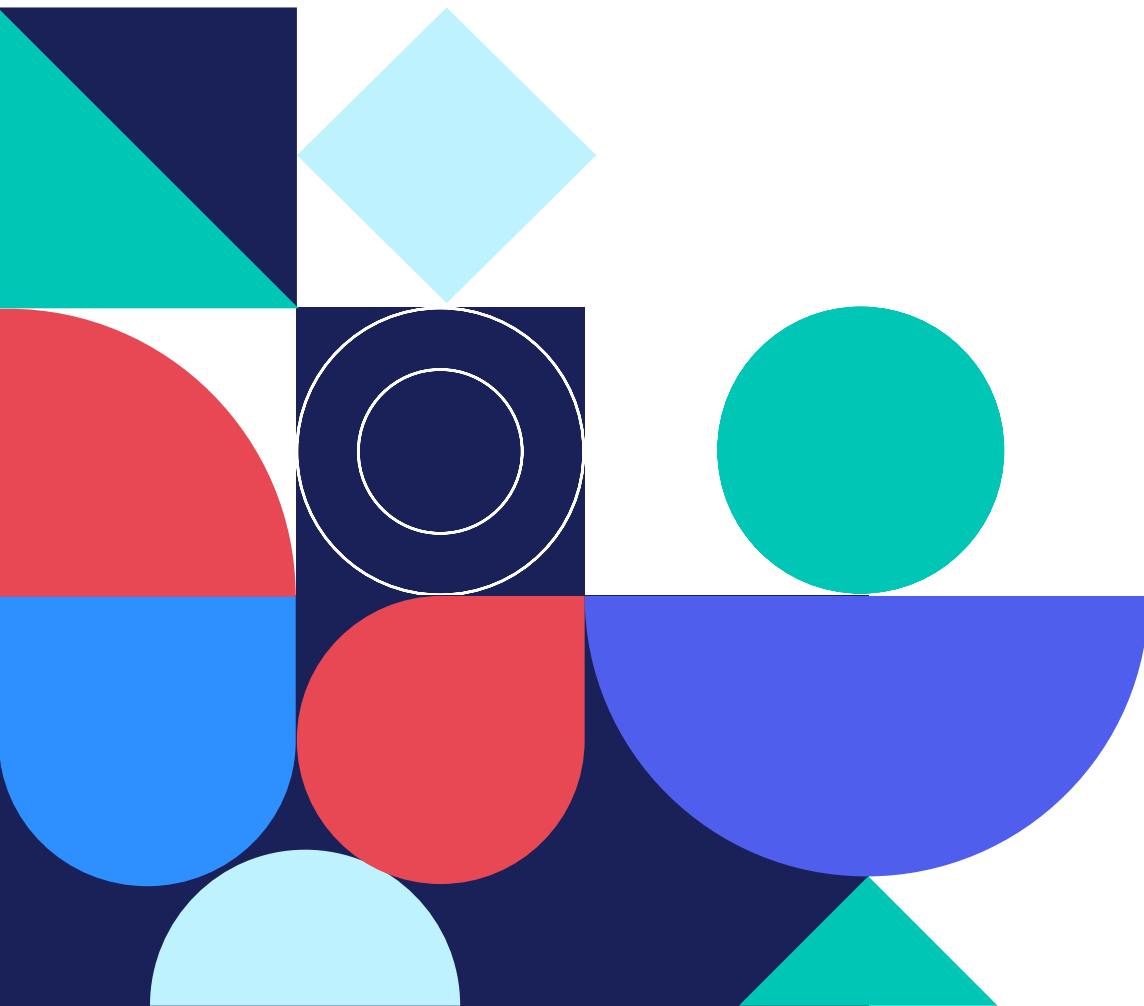
This last year has been a difficult, but defining moment for educators across the globe as it's revealed just how reliant we are on the quality of the connections we have with each other - especially those between teachers, parents and students. Learning in a pandemic world has challenged us all to become more responsive, adaptive and empathetic to the needs of our students and each other.

Thankfully, with the insights provided from annual reports such as these, we can now see how valuable added support from AI learning and innovative tutoring can be to closing education gaps and improving the overall wellbeing of both parents and their children throughout their schooling journey together. We hope you are inspired as much as we are to start applying the knowledge we've gathered and are excited at the prospect of a future, where every child has an equal opportunity to unlock their potential and succeed.

**FELIX OHSWALD -
CO-FOUNDER AND CEO, GOSTUDENT**



Thank you.



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