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- [Awards](#)
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- [Conferences](#)
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El article

Tutors on tap

Tutoring is no longer just a middle class luxury, Sunniva Davies-Rommetveit finds. Technology, workshops and scholarships are democratising the market

"The private tuition industry has burgeoned in the UK in recent years," an introduction on The Tutors' Association website reads. "Private tutors are utilised extensively by parents to supplement what is on offer through regular schooling... Yet, this substantial body of educators has gone largely unrecognised."



TTA is right to say that the global and UK tutoring market has been growing markedly. Research conducted in 2012 by Global Industry Analysts suggests it will be worth more than \$102.8 billion (£62.8 billion) internationally by 2018. And in the UK, a survey by educational resource company EdPlace found that as many as one in four British parents use a private tutor to supplement their child's education. In 2012, that amounted to about £6 billion spent by parents each year, or £2,758 per child.

It was quite something, then, that a market of this size did not have any serious trade group representation – until the formation of the TTA last July, that is. One of the organisation's key goals is to uphold consistent standards across the industry via its code of ethics. But not everyone has warmed to it: freelance tutors feel its attempts to informally regulate the industry will put many of their ilk out of business.

There are good arguments to suggest the TTA was necessary, however. Firstly, tutoring is a sprawling and fragmented industry with a perplexing number of sub-sectors. That can make it tough for parents to navigate. Moreover, it makes it hard for good tutoring businesses to stand out from bad ones. But with the TTA offering a stamp of approval, this will hopefully begin to change.

Industry mapping

In a sector this diverse, finding growth opportunities can appear quite daunting to observers. But the arrival of successful firms such as Explore Learning, Carfax Private Tutors and Enjoy Education have proved it can be done.

For Tom Maher, the TTA's chairman and founder of British Home Tutors, anyone thinking of building a tutoring business first needs to understand the industry's composition. There are five distinct segments to the market, he says: study centres; online tutoring; individual "freelance" tutoring; residential (a very niche market whereby wealthy parents send children to different countries to learn intensively) and tutoring agencies.

In the UK, the two most dominant segments are study centres and agencies. Study centres – whereby groups of students attend after-school classes – are "fairly oligopolistic," Maher says, with the biggest firms taking up large swathes of the demand. "First Class Learning, Explore Learning, Magikats and Genie Tutors are some of the most notable players in the British market," he says.

Perhaps the best known is Explore, which since 2001 has grown rapidly to encompass 96 study centres across the UK and two US centres in Texas. In 2012 it was subject to a £30 million management buyout, backed by Graphite Capital, and it plans to open scores of new centres through 2014 and 2015. Interestingly, the firm draws its learners from a wide range of affluence levels with about 35% of its 25,000 members coming from lower socioeconomic groups.

Managing director Robert Hicks explains that the company did in fact begin in more "affluent" English areas such as Chelmsford and Beaconsfield. But when it opened a centre in a less prosperous part of south west London, it "was our fastest growing centre at the time". This correlates with a Sutton Trust study which revealed that a staggering 40% of children in London were receiving some form of tutoring in 2013.

"Where we tend to do really well is in areas of high immigration," notes Hicks. "This is because first or second generation parents often want their children to really excel. The more mixed the area's demographic, the better an indicator it is for how successful the centre will be." Explore also has a scholarship fund for parents who are on income support.

The perfect learning environment?

The agency model has also proved successful, as firms like Carfax Private Tutors, Tutor Doctor and Fleet Tutors demonstrate. These businesses send their own, vetted tutors into people's homes for one-to-one lessons. The industry is coming under pressure to add value in an increasingly competitive market, though.

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"It's no longer simply saying 'here's the tutor's number – get on with it' anymore," Maher explains. "They need to give advice about tutoring centres a lot more, and are increasingly export-oriented."

A good example is Enjoy Education, whose founder Kate Shand joined David Cameron on a trade mission to China last December. Some businesses have also positioned themselves as an amalgamation of a study centre and tutoring agency. Bright Young Things, which has centres in Rochester, Tunbridge Wells, St Albans and Oxford, teaches small group tutorials for around £19 an hour, as well as offering one-to-one classes with specialist tutors at higher prices.

"We started off with two tutors and a modest number of students," says co-founder Woody Webster. "Now we have several hundred students a week across our centres and several hundred a month attend our one-on-one tutorials."

On top of this, Bright Young Things sells its business management software, TutorCruncher, to rival businesses – quite a sign of faith in the market growing. Webster says tutoring businesses are proliferating because of their relatively low start-up costs; at the same time rising class numbers in schools (up 200% since 2010, according to shadow education secretary Tristram Hunt) have made parents more open to the idea of tutoring.

"Schools do a lot of good work, but when you have 30 children in one class, how can that be a perfect learning environment?" When it comes to online tutoring, though, he insists pupils will only ever get so much from it. "Live, human interaction is the most conducive to learning."

'Every company is moving in this direction'

Not everyone agrees with him. Many companies in the industry offer online as part of their package, while some are exclusively online. Maher explains that firms like TutorMe and Tutorhub also offer a more affordable, readily accessible way to learn than traditional in-person tutoring — and that can widen access dramatically.

"Tutoring is moving down the [socioeconomic] quartiles now," he says, "and it's doing this with technology."

TutorHub, for instance, allows students to pick who out of 926 available tutors will be best equipped to teach them. For between £14 and £40 per hour, they can purchase a one-to-one lesson via Skype, logging on for exactly the amount of tuition time they need.

Whether such firms will begin to steal traditional tutoring businesses' market share remains to be seen; regardless, says Maher, when it comes to online, "every company is moving in this direction".

For freelance tutors, the largest yet most fragmented tutoring subsector (Maher says they could make up "around 85% of the industry"), this is good news. Freelancers typically comprise arts graduates from Russell Group universities with good degrees who are struggling to get jobs. Primary and secondary school teachers also tutor on a part-time basis.

But as the objection to the TTA's formation showed, freelancers have much to lose from the rise of more formal tutoring businesses. They could well benefit from the rise of online delivery, though, with websites offering them a visible and trusted platform to promote themselves.

A rich man's game?

While online provision and scholarship schemes are opening up the market to less privileged learners, there are still significant barriers to uptake.

One issue, says Maher, is that schools can be rather sniffy about tutors. This is understandable; few teachers can enjoy hearing that their pupils need external assistance. However, schools' scepticism and criticism can put pupils and parents off. (Take the high mistress of St Paul's independent girls' school, Clarissa Farr, who labelled tutoring a "significant industry which trades on insecurity and exam anxiety" in April last year).

Explore says it is trying to address this problem by conducting workshops with local councils and schools on areas like literacy. According to marketing director Heather Garrick, these go a long way to improving collaboration between schools, local authorities and private tutors, while also diversifying the learning environment for children.

In the past five years, UK tutoring has grown remarkably. Parental awareness about the competitive world in which we live has driven it; so too the increasing cost of private schools. Yet both Webster and Maher agree that demand has not kept up with the sheer number of new tutoring businesses entering the market.

"You can't stop people coming into the market and surviving, but I'm not too sure they're going to flourish," Maher says, adding that this could mark a slowdown in the industry. Yet opportunities still exist, particularly for online providers and those that make tutoring available for the masses, rather than a select few.



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