

The State of TEFL 2026

Global Industry Report

A comprehensive analysis of the global TEFL market, teaching destinations, AI integration, accreditation standards, and career opportunities for English language teachers worldwide.

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The data in this report draws from government statistics, industry bodies, academic research, and proprietary network insights covering teachers in over 140 countries. Published April 2026.

Executive Summary

The global English Language Teaching (ELT) industry is valued at approximately \$95 billion in 2026, growing at a compound annual growth rate (CAGR) of 6.5 to 7.3%, and is projected to reach \$181 billion by 2034. The Asia Pacific region accounts for 42% of the global market. Digital platforms, AI integration, and a Gen Z driven surge in teaching candidates are reshaping the profession from the ground up.

\$95B

Global ELT Market 2026

6.5–7.3%

Annual Growth Rate

\$181B

Projected Market 2034

42%

APAC Market Share

2B+

People Learning English

\$25.5B

Digital ELL by 2030

43%

TFA Corps Member Surge

12M

English Teachers Worldwide

The Level 5 Government Regulated TEFL Diploma

A central finding of this report is that the Level 5 Government Regulated TEFL Diploma has emerged as the benchmark qualification for employers across Asia and Europe. Language schools in South Korea, Japan, Thailand, Vietnam, Spain, Germany, and the Czech Republic increasingly specify Level 5 or equivalent as their hiring threshold. The standard requires a minimum of 168 hours of structured training, with some providers offering 180 hours or more to cover additional methodology and professional practice.

Key Findings

- **Market expansion continues:** The global ELT market is on track to double from \$89.5B (2024) to \$181B by 2034, driven by corporate demand, government programmes, and online platform growth (Market.us).
- **Digital is the fastest growing segment:** The digital English language learning market will grow from \$12.25B (2025) to \$25.47B by 2030 at an 18% CAGR, nearly three times the overall market growth rate.
- **Level 5 is the employer benchmark:** Across Asia and Europe, language schools and government programmes are converging on the Level 5 qualification as their hiring standard. Ofqual regulation and EQF Level 5 alignment provide employers with accreditation they can trust.

- Gen Z is choosing teaching over corporate careers: Teach For America experienced a 43% surge in incoming corps members over three years, and 9 in 10 Gen Z workers rank purpose over pay (Deloitte 2025).
- AI is transforming classroom practice: From automated assessments to AI powered pronunciation tools, artificial intelligence is now embedded across lesson planning, assessment, and professional development.
- The Gulf remains the highest paying region: UAE teachers earn \$3,500 to \$5,500 per month tax free, while South Korea and Japan offer \$1,700 to \$2,650 per month plus housing benefits.
- Teacher wellbeing is a growing crisis: 77% of teachers report frequent stress and 88% find their work overwhelming (Pew Research 2023), yet 83% say teaching gives them a sense of purpose (Gallup).
- Accreditation standards are tightening: Employers and governments increasingly demand verified, Ofqual regulated or equivalent credentials, with practical teaching hours becoming a standard requirement.
- Emerging markets are the next frontier: Africa, Central Asia, and Latin America show accelerating growth as governments invest in English proficiency for economic competitiveness.

Sources: Market.us, ELT Market Report | National Law Review, Digital ELL Market | Fortune, Gen Z Teaching Surge

The Global TEFL Market in 2026

The global English Language Teaching market is valued at approximately \$95 billion in 2026, growing at 6.5 to 7.3% annually, and is projected to reach \$181 billion by 2034. The Asia Pacific region accounts for 42% of the global market (\$37.4B in 2024).

How Big Is the TEFL Market in 2026?

The global ELT market reached \$89.5 billion in 2024 and is estimated at approximately \$95 billion in 2026. Multiple independent research firms confirm the market is on a trajectory to reach between \$173 billion and \$181 billion by 2034, representing a CAGR of 6.5 to 7.3%. The broader English teaching market, including corporate training and supplementary services, may exceed \$289 billion when all segments are included.

There are an estimated 12 million English teachers worldwide serving approximately 2 billion active English learners. More than 2 million TEFL positions open globally each year, reflecting sustained structural demand rather than cyclical growth.

Regional ELT Market Breakdown (2024–2026)

| Region | Market Share | 2024 Value (\$B) | Key Characteristics | Growth Outlook |
|----------------------|--------------|------------------|--|------------------------|
| Asia Pacific | 42% | \$37.4B | Government programmes, private academies, corporate training | Very High: 5.8–8% CAGR |
| Europe | ~22% | \$19.7B | Immigration driven demand, EU workforce mobility | Moderate: 4–5% CAGR |
| North America | ~18% | \$16.1B | ESL programmes, adult immigration education | Moderate: 5% CAGR |
| Middle East & Africa | ~10% | \$8.9B | Economic diversification, business English | High: 7–9% CAGR |
| Latin America | ~8% | \$7.2B | Growing middle class, business English demand | High: 6–8% CAGR |

What Is Driving TEFL Market Growth?

Five structural forces underpin continued market expansion: corporate English training demand, government funded language programmes, online learning normalisation, immigration and refugee integration programmes, and the spread of English as a medium of instruction in higher education. Adult learner programmes alone are growing at 5% annually through 2032. According to research, proficient English speakers earn 30 to 50% more than their peers, driving individual investment in language skills.

Sources: Market.us | Business Research Company | The TEFL Institute

The Rise of Digital English Language Learning

The digital English language learning market is projected to grow from \$12.25 billion in 2025 to \$25.47 billion by 2030 at an 18% CAGR. Online one to one platforms alone will grow from \$2.9 billion to \$6.34 billion (16.9% CAGR). 73% of students worldwide now prefer online learning formats.

Is Online TEFL Teaching Still Growing?

Emphatically yes. The pandemic normalised online instruction, and the shift has stuck. Teacher marketplaces are expanding rapidly, corporate language training in Europe alone is growing at 20.9% CAGR, and mobile access in developing markets is opening entirely new learner populations. For teachers, online work offers \$10 to \$40 per hour with complete schedule flexibility, though it lacks the cultural immersion that draws many to the profession in the first place.

Online vs In Person Teaching Comparison (2026)

| Factor | Online Teaching | In Person Teaching |
|----------------------|-----------------------------|-------------------------------------|
| Salary Range | \$10–\$40/hour | \$1,200–\$5,500/month |
| Startup Costs | Low (computer + internet) | Moderate to High (relocation, visa) |
| Geographic Reach | Global: teach from anywhere | Limited to one country or city |
| Student Access | 1.5B+ learners worldwide | Local student population |
| Schedule Flexibility | High: set your own hours | Fixed institutional schedule |
| Housing Benefit | None (work from home) | Often provided by employer |
| Cultural Immersion | Limited | Full immersion experience |
| Market Growth Rate | 18% CAGR | 4–6% CAGR |
| Student Preference | 73% want to continue online | Preferred for young learners |

Digital ELT Market Segments and Projections (2025–2030)

| Segment | 2025 Value | 2030 Projection | CAGR | Key Driver |
|-----------------------------|------------------|------------------|-------|-------------------------------|
| Digital ELL (Total) | \$12.25B | \$25.47B | 18.0% | Platform expansion |
| Online 1-to-1 Platforms | \$2.9B | \$6.34B | 16.9% | Teacher marketplaces |
| Online English Learning | — | — | 12.5% | Adult learners, mobile access |
| Global Online Education | \$203.81B (2026) | \$279.30B (2029) | 8.2% | Institutional adoption |
| Corporate Language (Europe) | \$2.23B growth | — | 20.9% | Workforce globalisation |

Sources: eLearning Statistics | Bridge Education | Research and Markets

Top TEFL Destinations and Salary Guide 2026

The highest paying country for TEFL teachers in 2026 is the UAE, where teachers earn \$3,500 to \$5,500 per month tax free. South Korea offers \$1,850 to \$2,650 per month with employer provided housing. More than 2 million TEFL positions open annually worldwide.

What Is the Highest Paying Country for TEFL Teachers?

TEFL Teacher Monthly Salary Comparison by Country (2026)

| Country | Monthly Salary (USD) | Tax Status | Housing Benefit | Cost of Living/Mo | Savings Potential |
|-----------------|----------------------|--------------|----------------------|-------------------|-------------------|
| UAE | \$3,500–\$5,500 | Tax free | Often provided | \$1,200–\$1,900 | Very High |
| Saudi Arabia | \$2,200–\$5,000 | Tax free | Often provided | \$800–\$1,400 | Very High |
| Kuwait | \$2,600–\$4,000 | Tax free | Often provided | \$900–\$1,500 | High |
| South Korea | \$1,850–\$2,650 | Low tax | Provided by employer | \$800–\$1,200 | High |
| Japan | \$1,700–\$2,600 | Standard tax | Allowance common | \$1,100–\$1,800 | Moderate |
| Taiwan | \$2,000–\$3,000 | Standard tax | Not standard | \$800–\$1,200 | Moderate to High |
| China | \$1,200–\$2,600 | Standard tax | Often provided | \$500–\$1,000 | Moderate to High |
| Vietnam | \$1,500–\$2,000 | Standard tax | Not standard | \$500–\$800 | Moderate |
| Thailand | \$1,000–\$1,500 | Standard tax | Not standard | \$600–\$900 | Low to Moderate |
| Cambodia | \$1,000–\$1,500 | Low tax | Not standard | \$400–\$700 | Moderate |
| Colombia | \$800–\$1,100 | Standard tax | Not standard | \$500–\$800 | Low |
| Online (Global) | \$10–\$40/hour | Varies | N/A | Home based | Varies |

Teachers holding a Level 5 Government Regulated TEFL Diploma consistently report salaries at the upper end of these ranges. The 180 hour Level 5 qualification, with its additional guided study beyond the 168 hour baseline, is recognised by hiring managers across both Asia and Europe as indicating stronger classroom readiness.

Where Are TEFL Teachers in Highest Demand?

Regional TEFL Demand Analysis (2026)

| Region | Demand Level | Key Drivers | Degree Required? | Typical Contract |
|----------------|------------------|--|----------------------------|------------------|
| East Asia | Very High | Government programmes, private academies, exam prep | Yes (most countries) | 12 months |
| Southeast Asia | High | Growing middle class, education budgets, tourism | Varies by country | 6–12 months |
| Middle East | High | Economic diversification, international business | Yes + experience preferred | 12–24 months |
| Latin America | Moderate to High | Remote learning, business English, tourism | Varies | 6–12 months |
| Europe | Moderate | Immigration, EU workforce mobility, business English | Often yes + EU citizenship | 9–12 months |
| Africa | Growing | English tied to economic mobility, government programmes | Varies | 6–12 months |
| Central Asia | Growing | Economic development, international trade | Varies | 12 months |
| Online | Very High | Platform expansion, corporate training | Not always required | Freelance |

How Much Can TEFL Teachers Save?

Savings potential varies widely by region. Teachers in Asia typically save 30 to 50% of their salary. Gulf state teachers can save \$2,000 to \$3,500 per month on tax free salaries. South Korea offers savings of \$1,000 to \$1,500 per month once employer provided housing is factored in. Southeast Asian destinations offer lower nominal salaries but living costs are correspondingly low, enabling a comfortable lifestyle with moderate savings.

What TEFL Qualification Do Employers Prefer?

TEFL Qualification vs Salary Comparison (2026)

| Qualification | Typical Hourly Rate | Monthly (Asia) | Monthly (Gulf) | Employer Preference |
|--------------------------------|---------------------|-----------------|------------------|-----------------------|
| 120hr TEFL (unregulated) | \$10–\$20/hr | \$1,000–\$1,500 | \$2,000–\$3,000 | Basic entry level |
| Level 5 TEFL Diploma (180hr) | \$15–\$35/hr | \$1,500–\$2,500 | \$3,000–\$5,000 | Preferred / benchmark |
| Level 5 + IELTS Specialisation | \$35–\$60/hr | \$2,000–\$3,500 | \$4,000–\$6,000+ | Highly sought after |

| Qualification | Typical Hourly Rate | Monthly (Asia) | Monthly (Gulf) | Employer Preference |
|---------------|---------------------|-----------------|-----------------|---------------------|
| CELTA + IELTS | \$35-\$65/hr | \$2,000-\$3,500 | \$4,000-\$6,500 | Top tier |

Teachers holding Level 5 qualifications earn 20 to 40% more in South Korea and Japan (GoOverseas, 2026). IELTS, used by 11,000+ organisations in 140+ countries, is the single most valuable specialisation a TEFL teacher can add.

Sources: GoOverseas | International TEFL Academy

Who Is Teaching English Abroad in 2026?

The profile of TEFL teachers is shifting. Gen Z now drives a significant share of new entrants, with Teach For America reporting a 43% increase in incoming corps members over three years. One in five teachers comes from a non traditional background, and 9 in 10 Gen Z workers rank purpose above pay (Deloitte 2025). Graduate unemployment at 5.8% continues to push young professionals toward international opportunities.



Why Do People Choose to Teach Abroad?

Motivations for Teaching English Abroad (2026)

| Motivation | Key Data Point | Source |
|-----------------------------|---|----------------------------|
| Purpose and meaning | 9 in 10 Gen Z rank purpose above pay; 83% of teachers feel sense of purpose | Deloitte 2025, Gallup |
| Financial strategy | Save 30–50% of salary in Asia; tax free earnings in Gulf states | International TEFL Academy |
| Housing and cost of living | Employer provided housing in Korea, Japan, Gulf; lower costs in SE Asia | GoOverseas |
| Career development | International experience valued by employers; pathway to education leadership | Industry consensus |
| Cultural immersion | Live and work in a new culture; develop intercultural competence | GoAbroad |
| Escape economic uncertainty | 5.8% graduate unemployment; 56% of Class of 2025 pessimistic about job market | Fast Company, Handshake |

Sources: Fortune | Teachers of Tomorrow | Fast Company

AI and the Future of English Language Teaching

Artificial intelligence is now embedded across every dimension of English Language Teaching, from lesson planning and pronunciation feedback to automated assessment and adaptive learning. AI tools save teachers an estimated 3 to 5 hours per week on administrative tasks. However, research consistently shows that AI augments rather than replaces human teachers: language learning remains fundamentally social and relational.

How Is AI Changing TEFL Teaching?

Key AI Applications in English Language Teaching (2026)

| Application | Key Tools | Description | Impact |
|--------------------------|--------------------------|--|--|
| Lesson Planning | ChatGPT, Gemini, Claude | Generate customised plans and differentiated materials | Saves 3–5 hours/week per teacher |
| Pronunciation | Elsa Speak, FluentU | Real time speech recognition, phoneme level feedback | Replaces native speaker practice partner |
| Assessment | AI powered grading tools | Automated essay scoring, grammar checking, progress tracking | Faster feedback cycles |
| Adaptive Learning | Duolingo, Babbel, Busuu | Personalised learning paths based on learner data | Higher engagement and retention |
| Professional Development | AI coaching platforms | Teacher training, self reflection tools, CPD tracking | Continuous improvement |
| Content Creation | ChatGPT, Canva AI | Reading passages, vocabulary exercises, cultural materials | Infinite customisation |

TEFL Explorer combines accredited TEFL content with AI powered career tools. For more on choosing an AI ready TEFL course, see [the full guide](#).

Will AI Replace English Teachers?

In short, no. AI handles repetitive, scalable tasks — grading, drill exercises, basic pronunciation feedback — freeing teachers to focus on what machines cannot replicate: building rapport, facilitating discussion, navigating cultural nuance, and motivating learners through the difficult middle stages of language acquisition. The most effective classrooms in 2026 blend AI efficiency with human empathy and judgment.

Sources: GoAbroad | ScienceDirect | Chalkbeat/RAND

Accreditation, Regulation and Certification Standards

The Level 5 Government Regulated TEFL Diploma, accredited by Ofqual and aligned to EQF Level 5, is the most widely recognised TEFL qualification among employers in Asia and Europe. The standard requires a minimum of 168 hours of structured training. A growing number of countries now specify Level 5 or equivalent for work visa eligibility.

Which Accreditation Bodies Matter?

TEFL Accreditation Bodies and Their Recognition (2026)

| Accreditation Body | Region | Type | Level | Recognition |
|---------------------|-------------------------|----------------------|---------------|--|
| Ofqual (UK) | United Kingdom / Global | Government regulator | RQF Level 3–5 | Primary standard for UK qualifications; visa eligibility |
| EQF (European) | European Union | Framework alignment | EQF Level 5 | Cross border recognition across 39 EU/EEA states |
| ACCET (US) | United States | Accrediting agency | Institutional | US Dept of Education recognised |
| ACTEFLC | United States | TEFL specific | Course level | TEFL course quality assurance |
| Cambridge (CELTA) | Global | Assessment body | RQF Level 5 | Most widely recognised globally |
| Trinity (CertTESOL) | Global | Assessment body | RQF Level 5 | Strong employer recognition, UK/Europe |

TEFL Certification Comparison

TEFL Certification Types Compared (2026)

| Certification | Hours | Level | Format | Cost Range | Best For |
|-----------------------|----------|-----------------|---------------------|-----------------|---|
| 120 Hour TEFL | 120 | Entry level | Online | \$150–\$400 | New teachers, online teaching |
| Level 5 TEFL Diploma | 168–420+ | RQF/EQF Level 5 | Online + assessed | \$400–\$1,200 | Career teachers, visa requirements |
| CELTA | 120+ | RQF Level 5 | In person / blended | \$1,500–\$2,800 | Experienced candidates, British Council |
| CertTESOL | 130+ | RQF Level 5 | In person / blended | \$1,500–\$2,500 | UK/Europe focus, Trinity schools |
| TEFL + Specialisation | 140–200+ | Varies | Online + modules | \$300–\$800 | Niche teaching (Business, IELTS) |

What Is the Difference Between a 168 Hour and 180 Hour Level 5 TEFL Diploma?

The 168 hour threshold defines the minimum guided learning hours for a Level 5 TEFL Diploma under Ofqual and EQF frameworks. A 180 hour programme goes further, allocating additional guided study in teaching methodology, classroom management, language awareness, and professional practice. Those extra hours produce measurably more prepared teachers, and the 180 hour Level 5 Diploma is now widely regarded as the gold standard qualification for TEFL employment across both Asia and Europe.

Why 180 Hours Matters in Asia

In South Korea, the EPIK programme and private hagwon recruiters consistently prioritise candidates with higher hour qualifications. Teachers holding 180 hour Level 5 Diplomas report being placed faster and at the upper end of the \$1,850 to \$2,650 monthly salary range. In Japan, where the JET Programme and eikaiwa schools set exacting standards, the additional methodology hours signal classroom readiness that employers value. A 180 hour qualification often distinguishes a candidate from the hundreds holding the minimum 120 or 168 hour certificates. In China, the world's largest TEFL market, schools in Tier 1 cities like Shanghai, Beijing, and Shenzhen increasingly list 'Level 5 or equivalent' as a requirement rather than a preference, and a 180 hour programme meets and exceeds that bar. In Vietnam, one of the fastest growing TEFL markets in Southeast Asia, work permit regulations have tightened and employers in Ho Chi Minh City and Hanoi actively seek teachers whose qualifications go beyond the minimum threshold.

Why 180 Hours Matters in Europe

In Spain, where more than 400 language schools operate in Madrid alone and the Auxiliares de Conversacion programme places thousands of teachers annually, a 180 hour Level 5 Diploma is the qualification most frequently cited by employers when hiring directly. It provides the depth of training that Spanish language academies associate with teacher retention and classroom confidence. In Germany, corporate English training is a multibillion euro market, and business language schools such as Berlitz and Inlingua prefer candidates with Ofqual regulated qualifications of 168 hours or more; the 180 hour programme offers a clear advantage. In the Czech Republic, Prague's language school market is one of the most competitive in Central Europe, and school directors report that teachers with 180 hour Level 5 qualifications require less in-house training and are classroom ready from day one. In Poland, where demand is growing rapidly in Warsaw, Krakow, and Wroclaw, the EU's recognition of EQF Level 5 qualifications means a 180 hour Diploma carries formal weight across all 39 EQF member states. In Italy, private language schools in Milan, Rome, and Florence increasingly specify Level 5 as their hiring benchmark, particularly for adult learners and business English programmes where instructional quality directly affects student retention.

In practice, the difference between 168 and 180 hours translates to stronger interview performance, faster placement, higher starting salaries, and greater confidence in the classroom. Teachers entering competitive markets in any of these nine countries will find that the 180 hour Level 5 Diploma

opens doors that a minimum-threshold qualification does not.

Read the full comparison: [180 Hour vs 168 Hour Level 5 TEFL Diploma: Which Do Employers Prefer?](#)

Data accurate as of March 2026.

Sources: Teach Away | GoOverseas | The TEFL Institute

Visa and Work Permit Landscape 2026

Visa regulations for English language teachers are tightening in several key markets. The UK Graduate Route is being reduced to 18 months (from 24) effective January 2027. Australia has lowered the 485 visa age limit to 35 with higher English requirements. Canada has restricted Post-Graduation Work Permits to key fields. At the same time, several countries now specify Level 5 or equivalent TEFL qualifications for work visa eligibility.

Country by Country Visa Requirements for TEFL Teachers (2026)

| Country | Visa Type | Degree? | TEFL Required? | Key Requirements | 2026 Changes |
|----------------|-------------------------|--------------|--------------------|--|----------------------------------|
| South Korea | E-2 Teaching Visa | Yes | Preferred (120hr+) | Criminal check, health exam | Stricter document verification |
| Japan | Instructor / Specialist | Yes | Preferred | Sponsoring employer, health exam | Stable requirements |
| China | Z Visa + Work Permit | Yes | 120hr+ required | 2 yrs experience OR TEFL, criminal check | Enhanced credential verification |
| Vietnam | Work Permit + TRC | Yes | 120hr+ required | Health check, notarised documents | Tighter enforcement |
| Thailand | Non B Visa | Yes | Preferred | Work permit from employer, medical check | Increased enforcement |
| UAE | Employment Visa | Yes | Preferred | Employer sponsorship, attested documents | Stable, high standards |
| Saudi Arabia | Work Visa | Yes | Preferred | Employer sponsorship, criminal check | Growing demand |
| Spain | Auxiliar / Work Visa | Yes | Preferred | EU citizenship or visa sponsorship | Limited non EU positions |
| Czech Republic | Zivno (Freelance) | Not always | Preferred | Trade licence, health insurance | EU Blue Card options |
| Colombia | Work Visa | Not always | Preferred | Employer sponsorship available | Relaxed requirements |
| Cambodia | Business Visa | Not required | Preferred | Easy to obtain, renewable | Stable, accessible |

Major 2026 Visa Policy Changes

Major 2026 Visa Policy Changes Affecting TEFL Teachers

| Country | Policy Change | Effective Date | Impact on TEFL Teachers |
|----------------|--|----------------|------------------------------------|
| United Kingdom | Graduate Route reduced to 18 months (from 24) | January 2027 | Less time for post study TEFL work |
| Australia | 485 visa age limit reduced to 35; higher English requirements | 2025–2026 | Excludes older career changers |
| Canada | PGWP restricted to key fields; reduced migration targets until 2027 | 2025–2026 | Fewer pathways for TEFL grads |
| Ireland | Stamp 1G standardised; mandatory €6,000 tuition upfront; financial proof | 2025–2026 | Higher upfront costs |
| New Zealand | Student work limit increased to 25 hours/week | 2025–2026 | More work opportunities |

Sources: IDP Education | GoOverseas | ESLstarter

Teacher Wellbeing and Career Sustainability

Teacher wellbeing has become a central concern in TEFL. According to Pew Research (2023), 77% of teachers report frequent stress and 88% say their job is overwhelming. A study published in ERIC found a burnout correlation coefficient of $r = 0.824$ (very high), and 93% of EFL teachers report failed institutional support. Yet despite this, 83% of teachers say teaching gives them a sense of purpose (Gallup), and 67% feel hope about the future of the profession (Morning Consult/EdChoice 2025).



Purpose Amid the Pressure: Teacher Wellbeing Data (2026)

| Metric | Statistic | Source | Implication |
|------------------------------|-----------|-------------------------------|--|
| Job gives sense of purpose | 83% | Gallup | Teaching remains deeply fulfilling |
| Feel hope about teaching | 67% | Morning Consult/EdChoice 2025 | Majority maintain optimism |
| Purpose important to Gen Z | 9 in 10 | Deloitte 2025 | New entrants motivated by meaning |
| Job frequently stressful | 77% | Pew Research 2023 | Structural issues threaten retention |
| Job is overwhelming | 88% | Pew Research 2023 | Workload is the primary pressure point |
| Failed institutional support | 93% | ERIC EFL Burnout Study | Systemic failure to support teachers |

The Moonrise Teacher Wellbeing Collective

The Moonrise Teacher Wellbeing Collective, a partnership between The TEFL Institute and [Moonrise Studios](#) in Huby, North Yorkshire, represents one of the first structured wellness programmes designed specifically for English language teachers. The programme addresses the compounding stressors that TEFL teachers face abroad: cultural dislocation, professional isolation, contract insecurity, and the emotional labour of classroom work.

The programme is led by Ava Bounds, a qualified Qigong Master and Certified Sound Therapist who trained under internationally recognised masters including Master Juanjo Estrella. Ava brings deep expertise in Traditional Chinese Medicine principles and specialises in Qigong based resilience and

recovery techniques adapted for educators working in demanding international contexts. The programme offers structured Qigong sessions, mindfulness frameworks, sound therapy, wellbeing guides, facilitated support, and community spaces with lifetime access.

Moonrise co-founder Deirdre Bounds brings her own connection to the TEFL world. She founded i-to-i, which became the world's largest trainer of English teachers before being acquired by TUI Travel in 2007. With more than 30 years of experience in education and wellness, Deirdre's involvement means the collective is rooted in genuine understanding of what teachers face abroad.

Industry Recommendations

- Mandatory wellness support integrated into teacher contracts
- Maximum 25 to 30 contact hours per week
- Funded continuing professional development (CPD)
- Transparent career progression pathways
- Access to mental health resources, including culturally appropriate services abroad

Sources: Pew Research | ERIC | Gallup | Morning Consult/EdChoice 2025

Community, Belonging and Where Teachers Go

Where a teacher goes matters almost as much as what qualification they hold. The strength of the local expat teaching community directly influences retention, wellbeing, and career satisfaction. Research consistently shows that teachers who build strong social networks abroad are significantly more likely to complete and renew contracts, while isolation remains the primary driver of early departure (Fenwick, 2020; Clemson University dissertation on expatriate teacher retention).

Why Does Community Matter for TEFL Teachers?

Teaching in a foreign country layers compounding stressors — culture shock, language barriers, unfamiliar educational systems, visa anxiety, and physical distance from established support networks — on top of the already demanding work of classroom teaching. A 2022 study in School Mental Health (Kaihoi and Bottiani) found that collegial support is directly associated with reduced teacher stress and burnout. Researchers identified a buffering hypothesis: interpersonal relationships function as protective factors against work related stress. Critically, the same study found a contagion effect, where teacher burnout levels correlated with the burnout of colleagues in their immediate social network.

A 2024 paper in the American Journal of Humanities and Social Science Research confirmed that lonely teachers are more likely to experience stress, burnout, and job dissatisfaction, and that the emotional strain of loneliness impairs the ability to form positive relationships with students. Community is not a luxury — it is a structural requirement for career sustainability.

Where Do Australian Teachers Go to Teach English Abroad?

Australians hold one of the most globally mobile passports for TEFL purposes, with Asia Pacific the dominant draw given geographic proximity.

| Rank | Country | Why Teachers Go There | Top Cities |
|------|-------------|--------------------------------------|---------------------------------------|
| 1 | Japan | JET Programme, eikaiwa schools | Tokyo, Osaka, Kyoto, Fukuoka |
| 2 | South Korea | EPIK, hagwons; salary + free housing | Seoul, Busan, Incheon |
| 3 | China | World's largest TEFL market | Shanghai, Beijing, Guangzhou, Chengdu |
| 4 | Vietnam | Rapidly growing; low cost of living | Ho Chi Minh City, Hanoi, Da Nang |
| 5 | Thailand | Lifestyle oriented; flexible entry | Bangkok, Chiang Mai, Phuket |

Highest concentration: South Korea (EPIK/hagwon pipeline); Vietnam (Ho Chi Minh City) growing fastest | JET Programme: 255 participants (2025)

Where Do Canadian Teachers Go to Teach English Abroad?

Canadians benefit from near identical standing to Americans in most TEFL markets and have streamlined access via EPIK and Spain's NALCAP programme.

| Rank | Country | Why Teachers Go There | Top Cities |
|------|-------------|---|--------------------------------------|
| 1 | South Korea | EPIK programme; highest savings potential | Seoul, Busan, Incheon, Daegu |
| 2 | Japan | JET Programme; strong cultural appeal | Tokyo, Osaka, Nagoya, rural JET |
| 3 | China | Highest absolute number of positions | Shanghai, Beijing, Chengdu |
| 4 | Vietnam | Growing market; beginner friendly | Ho Chi Minh City, Hanoi |
| 5 | Spain | NALCAP programme; European lifestyle | Madrid, Barcelona, Valencia, Seville |

Highest concentration: South Korea (EPIK and hagwon sectors) | JET Programme: 521 participants (2025)

Where Do Irish Teachers Go to Teach English Abroad?

Irish teachers hold a unique dual advantage: native English speakers and EU citizens. Post Brexit, European language schools increasingly prefer Irish teachers. Placements in Spain are up 35% over two years (TEFL.ie).

| Rank | Country | Why Teachers Go There | Top Cities |
|------|----------------|--|--------------------------------------|
| 1 | Spain | EU freedom of movement; Auxiliares programme | Madrid, Barcelona, Valencia, Seville |
| 2 | South Korea | EPIK and GEPIK programmes; excellent salary | Seoul, Busan, Incheon |
| 3 | Vietnam | High demand; low cost of living | Ho Chi Minh City, Hanoi, Da Nang |
| 4 | Czech Republic | EU freedom of movement; Prague TEFL market | Prague, Brno, Liberec |
| 5 | Poland | EU freedom of movement; growing demand | Warsaw, Krakow, Wroclaw |

Highest concentration: Spain (Madrid is the single highest concentration city) | JET Programme: 119 participants (2025)

Where Do New Zealand Teachers Go to Teach English Abroad?

Kiwis share near identical market access to Australians. New Zealand was one of four founding countries of the JET Programme in 1987.

| Rank | Country | Why Teachers Go There | Top Cities |
|------|-------------|---|----------------------------------|
| 1 | South Korea | EPIK programme; strong salary + benefits | Seoul, Busan, Incheon |
| 2 | Japan | JET Programme (founding country) | Tokyo, Osaka, rural placements |
| 3 | China | Strong salaries in Tier 1 cities | Shanghai, Beijing, Chengdu |
| 4 | Vietnam | Low cost of living; growing market | Ho Chi Minh City, Hanoi, Da Nang |
| 5 | Thailand | Classic lifestyle choice; beginner friendly | Bangkok, Chiang Mai, Phuket |

Highest concentration: South Korea (structured EPIK/hagwon pipeline) | JET Programme: 171 participants (2025)

Where Do South African Teachers Go to Teach English Abroad?

South Africa is officially recognised as a native English speaking country for E-2 visa purposes in South Korea and other Asian frameworks. JET participation grew 93% from 2014 to 2025.

| Rank | Country | Why Teachers Go There | Top Cities |
|------|-------------|--|------------------------------------|
| 1 | China | World's largest market; highest salary potential; free housing | Beijing, Shanghai, Suzhou, Chengdu |
| 2 | South Korea | EPIK + hagwon network; structured support | Seoul, Busan, Incheon |
| 3 | Vietnam | Lower entry barriers; low cost of living | Ho Chi Minh City, Hanoi |
| 4 | Thailand | High volume of positions; beginner friendly | Bangkok, Phuket, Chiang Mai |
| 5 | Spain | European lifestyle; student visa pathway | Madrid, Barcelona, Valencia |

Highest concentration: China (by volume); South Korea (disproportionately high relative to population) | JET Programme: 179 participants (2025)

Where Do UK Teachers Go to Teach English Abroad?

UK teachers are among the most in demand TEFL professionals globally. However, Brexit removed frictionless EU access, redirecting many toward Asia and the Middle East. An estimated 20,000 to 30,000 British teachers work in the Gulf region.

| Rank | Country | Why Teachers Go There | Top Cities |
|------|-------------|--|----------------------------------|
| 1 | UAE | Tax free salaries; British curriculum schools; largest British expat community | Dubai, Abu Dhabi, Sharjah |
| 2 | South Korea | EPIK programme; competitive salary | Seoul, Busan, Incheon |
| 3 | Japan | JET Programme (2nd largest English speaking contributor) | Tokyo, Osaka, rural JET |
| 4 | Vietnam | Growing market; large expat community | Ho Chi Minh City, Hanoi, Da Nang |
| 5 | Thailand | Huge volume of positions; strong expat community | Bangkok, Chiang Mai, Phuket |

Highest concentration: UAE (Dubai) for international schools; South Korea and Japan for language centres | JET Programme: 777 participants (2025)

Where Do US Teachers Go to Teach English Abroad?

Americans form the single largest nationality group in most major TEFL programmes. The JET Programme alone places over 3,000 Americans annually. Teach Away reported near doubling of US traffic year over year in 2024.

| Rank | Country | Why Teachers Go There | Top Cities |
|------|-------------|---|--------------------------------------|
| 1 | Japan | JET Programme (~3,000 recruited annually); strong cultural appeal | Tokyo, Osaka, Nagoya, Fukuoka |
| 2 | South Korea | EPIK + hagwon; free housing; airline reimbursement | Seoul, Busan, Incheon, Daegu |
| 3 | China | Highest absolute number of positions | Shanghai, Beijing, Chengdu, Shenzhen |
| 4 | Spain | NALCAP programme explicitly recruits Americans | Madrid, Barcelona, Valencia, Seville |
| 5 | Mexico | Geographic proximity; 24M English learners; accessible | Mexico City, Monterrey, Guadalajara |

Highest concentration: Japan (via JET, 3,000+ Americans); South Korea (Seoul) and China (Shanghai/Beijing) by raw numbers | JET Programme: 3,032 participants (2025)

JET Programme Nationality Breakdown (2025)

The JET Programme is the largest single structured placement programme for English language teachers worldwide. According to JET Programme official data (July 2025), the following breakdown shows participation by major English speaking nationality.

JET Programme Participants by Nationality (July 2025)

| Country | ALT Participants | CIR | Total |
|--------------|------------------|-----|-------|
| USA | 2,908 | 121 | 3,032 |
| UK | 733 | 44 | 777 |
| Canada | 496 | 25 | 521 |
| Australia | 236 | 19 | 255 |
| South Africa | 179 | 0 | 179 |
| New Zealand | 165 | 6 | 171 |
| Ireland | 108 | 11 | 119 |

Source: JET Programme Official Data, July 2025

Cross Nationality Destination Comparison

Destination Relevance by Teacher Nationality (2026)

| Destination | AUS | CAN | IRL | NZ | RSA | UK | US |
|-------------|-----------|-----------|----------|-----------|-----------|-----------|-----------|
| South Korea | Very High | Very High | High | High | Very High | High | Very High |
| Japan | Very High | Very High | Moderate | Very High | Moderate | Very High | Very High |
| China | High | High | Moderate | High | Very High | High | High |
| Vietnam | Very High | Moderate | High | High | High | High | Moderate |
| Thailand | High | Moderate | Moderate | High | High | High | Moderate |

| Destination | AUS | CAN | IRL | NZ | RSA | UK | US |
|-----------------|----------|----------|-----------|----------|----------|-----------|----------|
| Spain | Low | Moderate | Very High | Low | Moderate | Low | High |
| UAE | Moderate | Moderate | Moderate | Low | Moderate | Very High | Moderate |
| Czech Republic | Low | Low | High | Low | Low | Low | Moderate |
| Mexico/Lat. Am. | Moderate | Moderate | Low | Moderate | Low | Low | High |

Which Cities Have the Strongest TEFL Teacher Communities?

Top 10 Cities for TEFL Teacher Community Strength (2026)

| Rank | City | Community Strength | Key Notes |
|------|---------------------------|--------------------|---|
| 1 | Ho Chi Minh City, Vietnam | Very High | Consistently described as the best city for new TEFL teachers; large, welcoming, affordable |
| 2 | Seoul, South Korea | Very High | Vibrant social scene; EPIK cohort model creates instant peer networks |
| 3 | Bangkok, Thailand | Very High | Massive expat hub; 1,400+ member teacher Meetup group; established networks |
| 4 | Madrid, Spain | Very High | 400+ language schools; Auxiliares programme creates thousands strong annual cohort |
| 5 | Dubai, UAE | High | 16,000 member Empowering Expat Teachers community; structured British expat infrastructure |
| 6 | Tokyo, Japan | High | 8,600+ member language Meetup; large foreigner community; JET alumni network |
| 7 | Prague, Czech Republic | High | Vibrant expat community; low cost of living; central Europe travel hub |
| 8 | Taipei, Taiwan | High | Hobby based groups for frisbee, comedy, music, meditation, Gaelic football |
| 9 | Hanoi, Vietnam | High | Growing fast; more authentic feel noted by experienced teachers |
| 10 | Chiang Mai, Thailand | High | Digital nomad and TEFL teacher overlap creates strong community |

Sources: JET Programme | Vietnam Teaching Jobs | TEFL Institute of Ireland | The TEFL Academy | Kaihoi and Bottiani (School Mental Health, 2022) | AJHSSR 2024

Emerging Markets and Future Growth

Africa, Central Asia, and Latin America represent the next wave of TEFL market expansion. Government funded English programmes are expanding rapidly, driven by the recognition that English proficiency is directly tied to economic competitiveness. In sub-Saharan Africa, English proficiency correlates with 25 to 40% higher earnings.

Africa: The Largest Untapped Market

Sub-Saharan Africa is the largest untapped market for English language teaching. Countries including Rwanda, Ethiopia, and Senegal are investing heavily in English proficiency programmes. Salaries range from \$800 to \$1,500 per month, with lower living costs creating a reasonable quality of life for teachers willing to work outside traditional TEFL destinations.

Central Asia: Emerging Opportunities

Kazakhstan, Uzbekistan, and Georgia are emerging TEFL markets. Kazakhstan's Bolashak programme actively supports English education. Salaries range from \$1,000 to \$2,000 per month, and teachers report a genuine sense of pioneering community.

Latin America: Business English Driving Growth

Colombia, Mexico, Chile, and Brazil are seeing sustained growth driven by business English demand. Salaries range from \$800 to \$1,500 per month. Latin America appeals to teachers seeking Spanish language immersion alongside their teaching careers.

Future Growth Trends in TEFL (2026–2030)

| Trend | Description | Growth Potential | Key Driver |
|--------------------------|--|------------------|-------------------------------|
| Specialised English | Business English, IELTS prep, ESP, Academic English | High | Corporate budgets |
| Government Programmes | National English education initiatives | Very High | Economic competitiveness |
| Adult Learner Programmes | Immigration driven ESL, workforce upskilling | High | 5% annual growth through 2032 |
| Digital Nomad TEFL | Teaching from anywhere, multiple platforms | Growing | Remote work normalisation |
| Corporate Training | In house and outsourced business language programmes | Very High | Globalisation |
| AI Enhanced Teaching | Blended AI + human instruction, adaptive learning | Transformative | Technology adoption |

| Trend | Description | Growth Potential | Key Driver |
|-------------------|-------------------------------------|------------------|---------------------|
| Micro credentials | Specialised, stackable TEFL modules | Growing | Employer preference |

Market Projections Summary (2025–2030)

| Segment | 2025 Value | 2030 Projection | CAGR |
|-------------------------|------------------|------------------|-------|
| ELT Market Overall | \$89.19B | \$122.7B | 6.6% |
| Digital ELL | \$12.25B | \$25.47B | 18.0% |
| Online 1-to-1 Platforms | \$2.9B | \$6.34B | 16.9% |
| Online English Learning | — | — | 12.5% |
| Global Online Education | \$203.81B (2026) | \$279.30B (2029) | 8.2% |

Sources: Market.us | LinkedIn

Key Takeaways and Recommendations

Based on the data gathered for this report, here are ten actionable recommendations for TEFL teachers, training providers, and employers.

1. Invest in a Level 5 Government Regulated TEFL Diploma. It offers the broadest recognition, meets visa requirements in the most countries, and commands higher salaries in every region we examined.
2. Develop AI literacy as a core teaching skill. Teachers who can use AI tools effectively save 3 to 5 hours per week and produce more differentiated, engaging materials.
3. Consider the Gulf states for maximum savings. UAE and Saudi Arabia offer \$2,200 to \$5,500 per month tax free, with housing often provided. No other region matches this savings potential.
4. Embrace online teaching as a viable career path. The digital ELL market is growing at 18% CAGR, with experienced teachers earning up to \$35 per hour. It works well as a complement to or alternative for in person teaching.
5. Prioritise wellbeing and set sustainable boundaries. With 77% of teachers reporting frequent stress, building resilience practices into your routine is not optional. Seek out programmes like the Moonrise Teacher Wellbeing Collective.
6. Specialise, especially in IELTS. IELTS specialists earn \$35 to \$60 per hour, two to three times the rate of general TEFL teachers. It is the single highest return specialisation available.
7. Start visa planning 6 to 12 months early. Regulations are tightening across major markets. Document authentication, background checks, and credential verification take time.
8. Watch emerging markets for early mover advantage. Africa, Central Asia, and Latin America offer less competition, genuine cultural immersion, and growing institutional support.
9. Employers: invest in teacher wellbeing. 93% of teachers report failed institutional support. Schools that invest in wellness, community, and career development will attract and retain the best talent.
10. The industry needs standardised global accreditation. The current patchwork of national standards creates confusion. Movement toward mutual recognition frameworks would benefit teachers, employers, and learners alike.

Frequently Asked Questions

How big is the TEFL market in 2026?

The global English Language Teaching market is valued at approximately \$95 billion in 2026, growing at 6.5 to 7.3% CAGR, and is projected to reach \$181 billion by 2034. The Asia Pacific region holds a 42% market share. There are an estimated 12 million English teachers worldwide serving 2 billion learners, with more than 2 million positions opening annually (Market.us).

What is the highest paying country for TEFL teachers?

The UAE is the highest paying country for TEFL teachers in 2026, with salaries of \$3,500 to \$5,500 per month tax free. Saudi Arabia follows at \$2,200 to \$5,000 per month tax free. In East Asia, South Korea offers the best savings potential at \$1,850 to \$2,650 per month with employer provided housing (GoOverseas).

Do I need a degree to teach English abroad?

A bachelor's degree is required in most of East Asia (South Korea, Japan, China, Vietnam) and the Middle East. It is not required in Cambodia, Colombia, and some other Latin American countries. Most online teaching platforms do not require a degree. A Level 5 TEFL qualification can partially offset the degree requirement in some markets.

What TEFL qualification do employers prefer?

The Level 5 Government Regulated TEFL Diploma (Ofqual regulated, EQF Level 5 aligned) is the most widely recognised qualification among employers in Asia and Europe. The standard requires 168+ hours of structured training. CELTA and CertTESOL, both also at RQF Level 5, are equally respected globally (Teach Away).

Is online TEFL teaching still growing?

Yes. The digital English language learning market is projected to grow from \$12.25 billion (2025) to \$25.47 billion by 2030 at 18% CAGR. 73% of students prefer online learning. Experienced online teachers earn \$10 to \$40 per hour with complete schedule flexibility.

How is AI changing TEFL teaching?

AI is integrated across lesson planning, pronunciation training, assessment, and adaptive learning. Tools like ChatGPT, Elsa Speak, and Duolingo save teachers an estimated 3 to 5 hours per week. However, AI augments rather than replaces teachers: language learning remains fundamentally social and relational (Chalkbeat/RAND).

How much can TEFL teachers save?

Gulf states: \$2,000 to \$3,500 per month on tax free salaries. South Korea: \$1,000 to \$1,500 per month after housing is provided. Southeast Asia: 30 to 50% of salary. Savings depend heavily on lifestyle choices and whether housing is included in the employment package (International TEFL Academy).

What countries need TEFL teachers most?

East Asia (South Korea, Japan, China) and the Middle East (UAE, Saudi Arabia) have the highest demand. Southeast Asia is growing rapidly. Africa and Central Asia are emerging markets with accelerating demand. More than 2 million TEFL positions open globally each year.

Is TEFL a real career?

Yes. Career progression includes senior teaching, academic management, teacher training, curriculum development, and educational technology roles. There are 12 million English teachers worldwide. Teachers with Level 5 qualifications and IELTS specialisation earn \$35 to \$60 per hour in premium markets.

What are Ofqual regulated TEFL courses?

Ofqual is the UK government body that regulates qualifications and examinations. Ofqual regulated TEFL courses meet verified quality standards and carry formal recognition. Level 5 Ofqual regulated courses align with EQF Level 5, providing cross border recognition across 39 European countries. Several countries now specify Level 5 or equivalent for visa eligibility.

What is the TEFL job market outlook for 2026 to 2030?

Strongly positive. The market is projected to grow from \$95 billion (2026) to \$181 billion by 2034. Digital ELL alone is growing at 18% CAGR. More than 2 million positions open annually. Demand is structural rather than cyclical, driven by globalisation, immigration, and economic development.

What is the difference between a 168 hour and 180 hour Level 5 TEFL diploma?

The 168 hour threshold is the minimum for a Level 5 TEFL Diploma under Ofqual and EQF frameworks. The 180 hour programme is now widely regarded as the gold standard, allocating additional guided study in methodology, classroom management, and professional practice. In Asia, employers in South Korea (EPIK, hagwons), Japan (JET, eikaiwa), China (Tier 1 cities), and Vietnam actively prefer 180 hour graduates. In Europe, language schools in Spain, Germany, Czech Republic, Poland, and Italy increasingly cite 180 hours as their hiring benchmark. Teachers with 180 hour qualifications report faster placement and higher starting salaries. For a detailed comparison, see [180 Hour vs 168 Hour: Which Do Employers Prefer?](#)

Where do American teachers go to teach English abroad?

Japan is the top destination for American TEFL teachers, with the JET Programme placing over 3,000 Americans annually (51% of all JET participants). South Korea is second via EPIK and hagwons, with an estimated 6,000 to 8,000 Americans holding E-2 visas. China and Spain (via NALCAP) round out the top four. Mexico is increasingly popular due to geographic proximity (JET Programme 2025 data).

Where do UK teachers go to teach English abroad?

The UAE (particularly Dubai) is the top destination for British TEFL teachers, with an estimated 20,000 to 30,000 British teachers in the Gulf region. Post Brexit, UK teachers no longer have automatic EU work rights, redirecting many toward Asia and the Middle East. South Korea and Japan (777 UK participants in JET 2025) remain strong markets for language centre teaching.

Where do Irish teachers go to teach English abroad?

Spain is the dominant destination for Irish TEFL teachers, driven by EU freedom of movement and the Auxiliares de Conversacion programme. Irish teacher placements in Spain increased 35% over two years (TEFL.ie). South Korea (EPIK), Vietnam, the Czech Republic, and Poland complete the top five. Irish teachers have a unique post Brexit advantage as the only native English speaking EU citizens.

Is TEFL teaching a good career in 2026?

TEFL is a viable and growing career in 2026. The \$95 billion global market is expanding at 6.5 to 7.3% annually. Teachers with Level 5 qualifications and IELTS specialisation earn \$35 to \$60 per hour. Career paths include academic management, teacher training, curriculum development, and EdTech. However, teacher wellbeing remains a concern: 77% report frequent stress, making it important to choose employers and destinations carefully.

How much do TEFL teachers earn in the UAE?

TEFL teachers in the UAE earn \$3,500 to \$5,500 per month tax free in 2026. Housing is often provided by the employer. The cost of living runs \$1,200 to \$1,900 per month, creating very high savings potential of \$2,000 to \$3,500 per month. The UAE is the highest paying TEFL destination globally.

What are the best cities for TEFL teacher communities?

The top cities for TEFL teacher community strength in 2026 are: Ho Chi Minh City (Vietnam), Seoul (South Korea), Bangkok (Thailand), Madrid (Spain), and Dubai (UAE). Ho Chi Minh City is consistently described as the most welcoming city for new TEFL teachers, while Seoul's EPIK cohort model creates instant peer networks.

Methodology and Sources

This report draws from government agencies, industry research firms, academic publications, programme data, and The TEFL Institute's network insights. Statistics are sourced from 2023 to 2026 reports. Where exact figures are unavailable, we use industry consensus estimates and note the limitation.

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All statistics are industry estimates unless noted as official government or programme data. The TEFL market is dynamic; numbers should be treated as indicative rather than definitive, as no single database tracks TEFL teacher flows comprehensively across all destinations. Research compiled April 2026. All URLs verified at time of publication.

About the Authors

TEFL Institute Research Team

This report was compiled by the TEFL Institute Research Team, drawing on more than 40 years of combined experience in English as a Foreign Language education. The team's expertise spans curriculum development, teacher training, international placement, accreditation standards, and digital learning innovation. Their work is informed by direct relationships with language schools, government education programmes, and teacher communities in over 140 countries.

About The TEFL Institute

The TEFL Institute is a global TEFL certification provider offering Ofqual regulated Level 5 Diplomas. The Institute serves teachers in over 140 countries and has trained tens of thousands of English language educators. Programmes include the 180 hour Level 5 Government Regulated TEFL Diploma, IELTS specialisation, Business English tracks, and comprehensive career support through the TEFL Explorer platform.

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