THE TEFL INSTITUTE OF IRELAND · RESEARCH TEAM

The State of TEFL 2027

2027 edition · Published November 2026

The global English-teaching market in 30 pages and more than 25 charts: the money, the programmes that publish their pay, the qualifications employers can verify, and what teachers can expect to earn and keep. Every figure dated and sourced.



Published by The TEFL Institute of Ireland · tefl.ie
Published 12 November 2026 · Figures as checked 1 November 2026 · New datasets read 12 November 2026
Official programme figures verified at source 17 October 2026
Qualification references confirmed against the Ofqual register 1 September 2026
How to cite this report is on the last page.

CONTENTS

What is in this report

#	Section	Page
1	Executive summary	3
A	At a glance, and ten findings to quote	4
2	The global TEFL market	5
3	English demand	8
4	Government programmes	12
5	Qualifications	16
6	Salary guide	19
7	Who is teaching	24
8	AI in teaching	25
9	Visas and work permits	26
10	Where the market is going	28
11	Corrections ledger	29
12	Methodology and sources	29

How to read the charts

Every chart and table carries its source and its basis. Three colours are used throughout, and a figure is never shown in a colour it has not earned:

Official
Read on the programme's, regulator's or publisher's own page and dated. Green.

Market estimate
Compiled from job listings and guides in March 2026; not re-verified. Blue.

Survey, implied or derived
A survey result, or arithmetic on a published figure, and labelled as such. Amber.

Dates that matter

What	When it was checked
Official programme pay and application windows	17 October 2026, on each programme's own page
Qualification references (Ofqual register)	1 September 2026, by hand
Market.us, Pew, Deloitte, Fortune figures	1 November 2026, on the publishers' own pages
EF index, EnglishUK, Ireland and JET participant figures	12 November 2026
Salary, cost, requirement and visa estimates	Compiled March 2026; labelled wherever they appear

Corrections

This edition carries a corrections ledger (Section 11) listing what the March 2026 edition got wrong. Figures that could not be sourced were removed rather than carried forward, and later corrections are recorded on the Institute's editorial standards page.

SECTION 1

Executive summary

In one paragraph. The English language training market was worth US$89.5 billion in 2024 and is forecast by Market.us to reach US$181.1 billion by 2034, a 7.3% compound annual growth rate, with Asia-Pacific holding 42% of it. About 1.5 billion people are learning English, on the British Council's estimate. Only four government teaching programmes publish a pay scale: Japan's JET (¥4.02 million in year one), South Korea's EPIK (2.2 to 2.8 million won a month), France's TAPIF (€1,010.67 a month gross) and Spain's NALCAP (€800 to €1,000 a month). Every other salary figure in circulation, including the ranges here, is a market estimate from job listings. The qualification employers can check is a regulated one: Ofqual-listed Level 5 diplomas carry a number that can be searched on a public register.

This edition keeps the European and Irish framing of the March report: what the market looks like from Ireland, where EU work rights change the calculation, and what Irish graduates can expect to earn and keep.

What is new in the 2027 edition

- **Thirty pages and more than 25 charts.** The market, pay, cost, visa and demand data are drawn, not only tabulated, and every chart carries its source and basis.
- **Four new datasets,** read on 12 November 2026: the EF English Proficiency Index 2025 (123 countries and regions), the EnglishUK global study-travel overview for 2024, English Education Ireland's 2025 annual report as reported by ICEF Monitor, and Japan's FY2025 JET Programme participant numbers.
- **Official programme pay and application windows** (Section 4), verified on the programmes' own pages on 17 October 2026, in local currency and US dollars.
- **Regulated qualification references** (Section 5), confirmed by hand against the Ofqual register on 1 September 2026.
- **A corrections ledger** (Section 11) of what the March 2026 edition got wrong. Figures that could not be sourced have been removed, not carried forward.

Five numbers to carry

Figure	Value	Source and date
Global ELT market, 2024 to 2034	US$89.5bn to US$181.1bn, CAGR 7.3% (2025–2034)	Market.us, ELT Market report, 26 August 2025
People learning English	About 1.5 billion	British Council (LearnEnglish); Future of English puts speakers to some level at 2.3 billion
Highest official programme pay	JET, Japan: ¥4.02 million in year one, about US$2,120 a month	CLAIR, via JET Program USA, verified 17 October 2026
Teachers who say the job is frequently stressful	77% (68% say overwhelming)	Pew Research Center, 2,531 US public K-12 teachers, survey 17 Oct–14 Nov 2023, published 4 April 2024
Young workers for whom purpose matters to job satisfaction	89% of Gen Zs, 92% of millennials	Deloitte 2025 Gen Z and Millennial Survey, 14 May 2025

AT A GLANCE

Twelve numbers and ten findings you can quote

Start here. Twelve figures carry most of the argument in the pages that follow. Each shows its source underneath; the full context, caveats and charts are in the sections named in the contents.

US$89.5bn
Global English language training market, 2024
Market.us, 26 Aug 2025

US$181.1bn
Forecast for 2034
Market.us, 26 Aug 2025

7.3%
Compound annual growth, 2025–2034
Market.us, 26 Aug 2025

42%
Share held by Asia-Pacific, 2024
Market.us, 26 Aug 2025

48%
Online share of ELT by method, 2024
Market.us, 26 Aug 2025

1.5bn
People learning English
British Council, LearnEnglish

2.3bn
People who speak English to some level
British Council, Future of English

123
Countries and regions ranked by the EF English Proficiency Index 2025; 2.2 million test takers
EF, 19 Nov 2025

1.01m
English language students in eight major study destinations, 2024: 73% of 2019
EnglishUK, 2025 overview

124,789
Students in Ireland, 2025 (+2%); student weeks 609,734 (−18%)
English Education Ireland, via ICEF Monitor, 18 Jun 2026

5,933
Participants on the JET Programme, FY2025, from 54 countries
Japan MIC (Soumu), FY2025

77%
US public school teachers who find the job frequently stressful
Pew Research Center, 4 Apr 2024

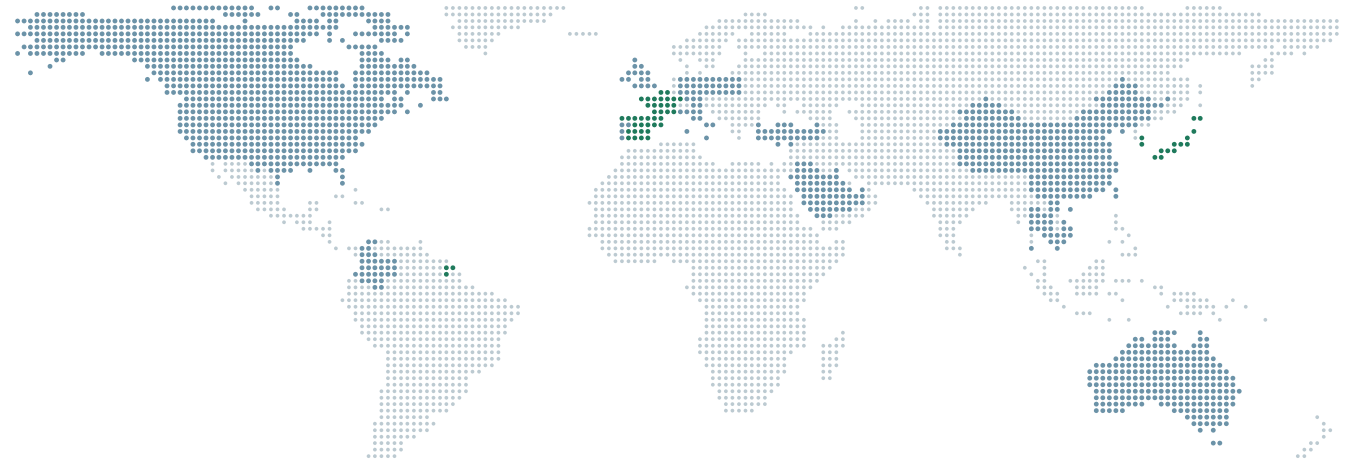
Ten findings in citable form

Each sentence stands alone, with its source and date, so it can be quoted without the surrounding text. Basis: official = read at source; estimate = compiled March 2026; survey = survey result.

1. The global English language training market was worth US$89.5 billion in 2024 and is forecast to reach US$181.1 billion by 2034, a 7.3% compound annual growth rate (Market.us, 26 August 2025).
2. Only four government teaching programmes publish a pay scale: JET in Japan, EPIK in South Korea, TAPIF in France and NALCAP in Spain (verified 17 October 2026).
3. JET's published first-year pay is ¥4.02 million, about US$2,120 a month; EPIK's main scale is 2.2 to 2.8 million won a month, about US$1,650 to US$2,100, with a furnished apartment (verified 17 October 2026).
4. About 1.5 billion people are learning English and about 2.3 billion speak it to some level (British Council).
5. The Level 5 Diploma in TEFL (610/1571/4) and Level 5 Advanced Diploma in TEFL (610/1573/8) are Ofqual-regulated qualifications awarded by Highfield Qualifications, and a regulated qualification number can be searched on the public register (confirmed 1 September 2026).
6. In 2024 the eight major English-language study destinations hosted about 1.01 million students, 73% of the 2019 total (EnglishUK, 2025).
7. Ireland counted 124,789 English-language students in 2025, up 2%, but student weeks fell 18% to 609,734 as the average stay shortened from 6.4 to 4.9 weeks (English Education Ireland, via ICEF Monitor, 18 June 2026).
8. Digital English language learning is forecast to grow about 15.8% a year to 2030, roughly twice the 7.3% forecast for the whole market (Research and Markets, March 2026; Market.us).
9. A bachelor's degree is required for the work visa in most of East Asia and the Gulf, while EU citizens need no work visa to teach inside the EU (embassy and provider guidance, March 2026).
10. Market estimates put English-teacher pay at US$2,200 to US$5,500 a month tax-free in the Gulf, against roughly US$1,200 to US$3,000 in East Asia (job-listing compilation, March 2026).

SECTION 2

The global TEFL market

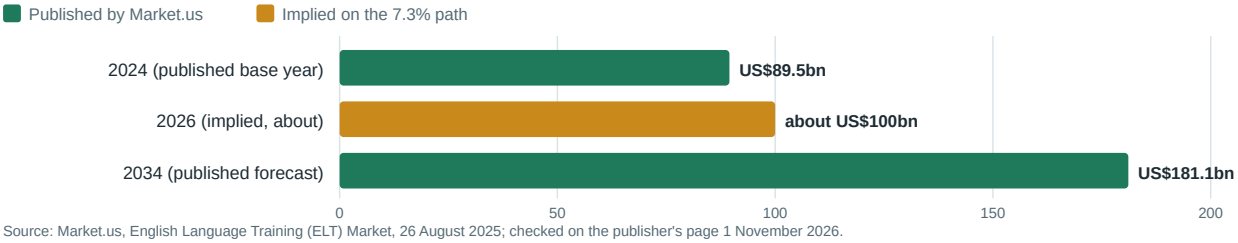


Countries with salary, programme, visa or study-travel data in this report. Map: Natural Earth (public domain).

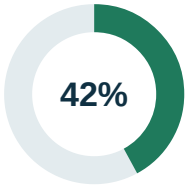
How big is the market? Market.us valued the global English language training (ELT) market at US$89.5 billion in 2024 and forecasts US$181.1 billion by 2034, growing 7.3% a year over 2025 to 2034. On that path the 2026 figure is roughly US$100 billion; no published 2026 actual exists yet. Asia-Pacific held 42% of the 2024 market (US$37.4 billion), and China alone was US$35.6 billion.

Global English language training market

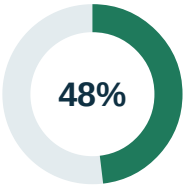
US$ billion. Market.us publishes 2024 and 2034 only; the 2026 bar is arithmetic on its 7.3% growth rate, not a published figure.



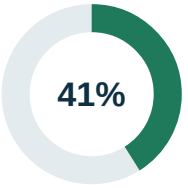
Source: Market.us, English Language Training (ELT) Market, 26 August 2025; checked on the publisher's page 1 November 2026.



Asia-Pacific share
of the 2024 market, US$37.4bn



Online by method
share of ELT, 2024



K-12 and higher ed
share by end-user, 2024

CANONICAL DATA BLOCK · MARKET SIZE

Market.us figures checked against the publisher's own report page on 1 November 2026.

Measure	Value	Period	Source
Global ELT market	US$89.5bn, forecast US$181.1bn, 7.3% CAGR	2024; 2034; 2025–2034	Market.us, 26 Aug 2025
Asia-Pacific share	42%, US$37.4bn	2024	Market.us
China ELT market	US$35.6bn to US$62.56bn, 5.8% CAGR	2024 to 2034	Market.us
Online learning share, by method	48%	2024	Market.us
K-12 and higher education share, by end-user	41%	2024	Market.us

China is the single largest national market in the Market.us data, at US$35.6 billion in 2024, but it is forecast to grow more slowly (5.8% a year) than the market as a whole (7.3%). The growth in the forecast therefore comes from outside China.

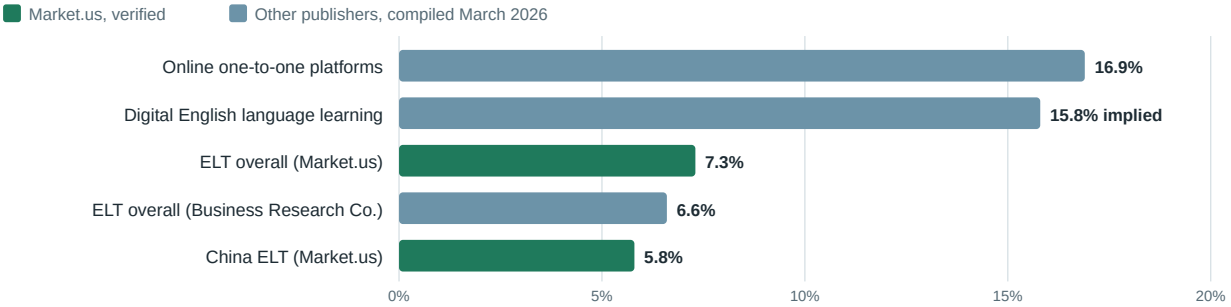
SECTION 2

Segments, forecasts and the spread between them

Which parts of the market grow fastest? On the published forecasts, the digital and online segments: digital English language learning at about 15.8% a year implied (Research and Markets, 2025 to 2030) against 7.3% for the whole market (Market.us, 2025 to 2034). Different research houses define the market differently, and the spread between them is the honest picture.

Compound annual growth rates by segment

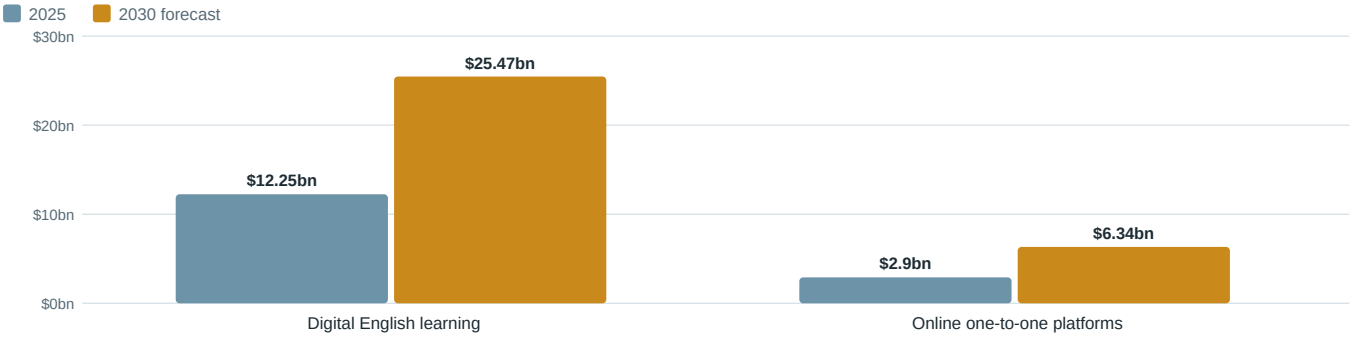
Per cent a year. The 15.8% is calculated from the two published endpoints; the March 2026 edition's 18% is withdrawn.



Sources: Market.us (verified 1 Nov 2026); The Business Research Company and Research and Markets (compiled March 2026, not re-verified).

Two fast-growing segments, 2025 to 2030

US$ billion. Research and Markets, compiled March 2026; not re-verified.



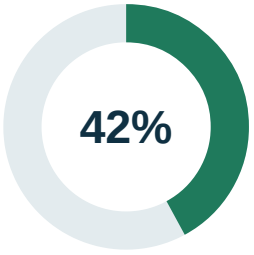
Segment	Value	Projection	CAGR	Source
ELT market overall	US$89.5bn (2024)	US$181.1bn (2034)	7.3%	Market.us, re-verified 1 Nov 2026
ELT market, alternative	—	US$122.7bn (2030)	6.6%	The Business Research Company (March 2026)
Digital English language learning	US$12.25bn (2025)	US$25.47bn (2030)	about 15.8% implied	Research and Markets (March 2026)
Online one-to-one platforms	US$2.9bn (2025)	US$6.34bn (2030)	16.9%	Research and Markets (March 2026)

Figures other than Market.us were compiled in March 2026 from the publishers' summary pages and have not been re-verified. Readers who need them for their own work should check the source directly.

SECTION 2

The regional picture

Where is the work? Asia-Pacific holds 42% of the market and the largest volume of salaried posts. For the other regions there is no reliable published share, which is stated rather than estimated; the March edition's roughly 30% for Europe was a LinkedIn estimate and is withdrawn.



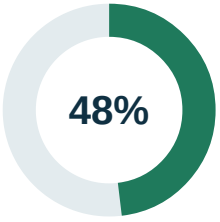
Asia-Pacific
share of global ELT, 2024

One published regional share. Market.us is the only source checked that publishes a regional share, and only for Asia-Pacific. The 58% outside Asia-Pacific is not broken down by region in any source this report could verify, so it is not drawn as a pie.

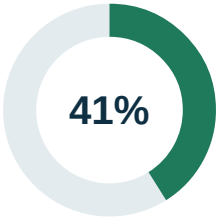
For an applicant, the practical reading is by job type rather than by market share: government programmes and private academies in Asia, adult and corporate programmes in Europe, tax-free salaried posts in the Gulf, academy and business English in Latin America.

Region	Share	What drives it	What it means for an applicant
Asia-Pacific	42% of the global market (Market.us, 2024)	Government programmes, private academies, exam preparation	Largest volume of salaried posts; housing often included; a degree and work visa required in the main markets
Europe	No reliable published share	Corporate training, adult programmes, language assistant schemes	EU citizens need no work visa inside the EU; pay is lower than East Asia and the Gulf
Middle East	No published share	Tax-free salaries, international schools, economic diversification	Highest cash pay; degree plus TEFL and often a teaching licence for schools
Latin America	No published share	Business English, academy demand, low cost of living	Lower pay; no government publishes academy wages, so the legal minimum wage is the floor to check an offer against

How the market is delivered



Online
by method, 2024



K-12 and higher education
by end-user, 2024

Market.us splits the same market two ways, by delivery method and by who is learning. Online learning is the largest delivery method at 48% in 2024; K-12 and higher education is 41% by end-user. The remaining shares were not checked and are not shown.

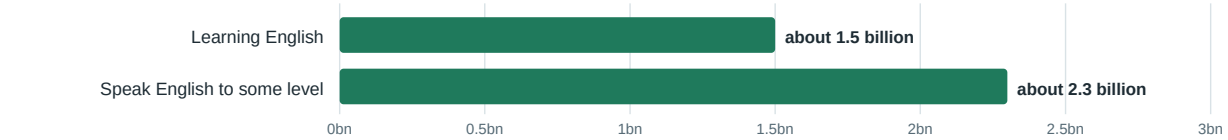
SECTION 3

English around the world

> **How many people learn English?** About 1.5 billion, on the British Council's estimate, and about 2.3 billion speak it to some level. The two numbers answer different questions, and the March 2026 edition's "2 billion currently learning" contradicted both.

Learners and speakers of English

Billions of people



Sources: British Council, LearnEnglish language table (1.5bn learners); British Council, The Future of English: Global Perspectives (2.3bn speakers).

How employers describe a learner: the CEFR ladder

Job advertisements describe learner groups by the Common European Framework of Reference for Languages, defined by the Council of Europe with "can do" descriptors. A teacher who reads "B1 to B2 adults" is being told the learners are independent users who can handle everyday topics but not yet fluent, and a CEFR level on an advert is a more useful guide to the work than the school's own label.

A1	A2	B1	B2	C1	C2
Basic user	**Basic user**	**Independent**	**Independent**	**Proficient**	**Proficient**
Beginner	Elementary	Intermediate	Upper intermediate	Advanced	Mastery

Council of Europe CEFR level groupings, checked live 1 September 2026. The grouping into basic, independent and proficient users is the Council's own.

What the two numbers do not say

- **Learners are not a demand count for teachers.** A learner may study with an app, in a state school or with a private tutor; the figure does not say how many paid teaching hours exist.
- **Speakers are not learners.** The 2.3 billion includes people who use English with limited fluency and no longer study it.
- **Neither number is a 2026 measurement.** Both are the British Council's published estimates; this report uses them as orders of magnitude, not as precise counts.

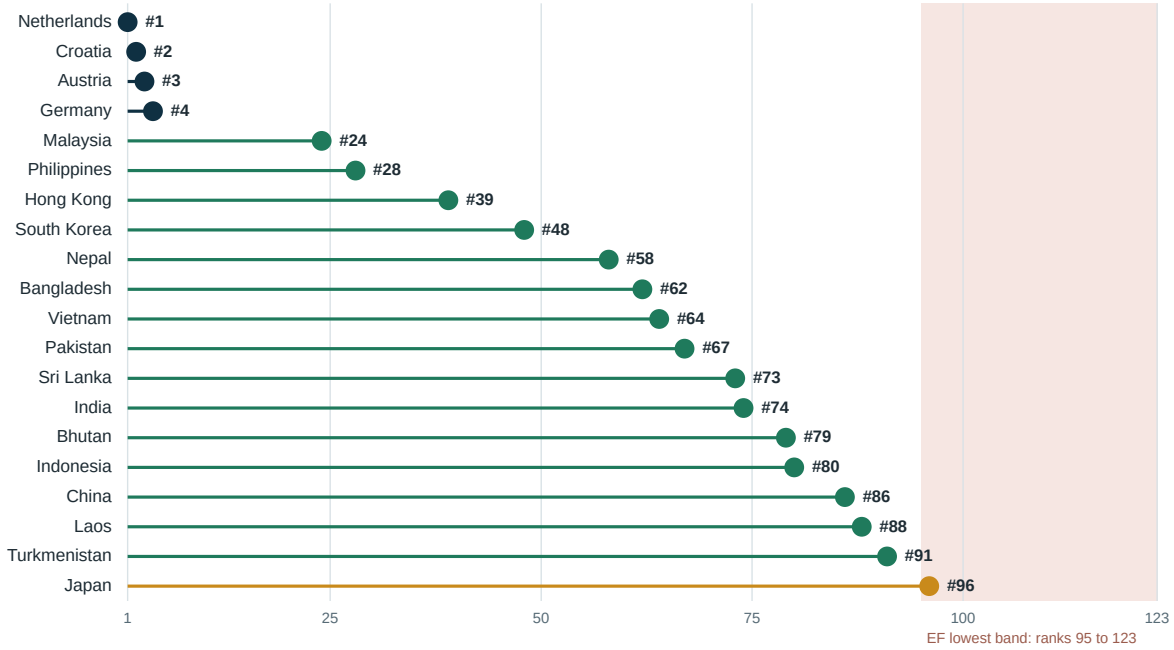
SECTION 3

How well does the world speak English? The EF index

> **Which countries score highest?** In the EF English Proficiency Index 2025, published 19 November 2025 from 2.2 million EF SET test takers in 123 countries and regions, the Netherlands ranks first, followed by Croatia and Austria, with Germany fourth. Asia has the narrowest skill gap between its countries; Latin America has the widest age disparity; Europe's results have plateaued.

EF English Proficiency Index 2025: rank among 123 countries and regions

Rank 1 is highest. Navy: the top four (Europe). Green: Asian entries named in the Nippon.com analysis. Amber: Japan.



Sources: EF Education First, EPI 2025 launch release, 19 Nov 2025 (top four); Nippon.com analysis of the EF EPI 2025 (Asian ranks).

Japan is the headline. It ranked 96th of 123, 17th of 25 Asian entries, and fell into EF's fifth and lowest band, "very low proficiency" (ranks 95 to 123). Japan also runs the JET Programme, which took in 5,933 participants from 54 countries in FY2025 (Section 4); the index measures test takers, not the programme's effect.

How to read an index like this

- **It ranks test takers, not populations.** EF's index is built from the results of people who took EF's online test. It is a useful comparative signal, not a census of each country's English.
- **A low rank is not a pay forecast.** Rank says nothing about what an English teacher is paid; the pay in Section 6 comes from different sources.
- **Neighbouring ranks are not meaningful.** Several countries sit within a few places of each other; the chart shows ranks as published and is not a league table of teaching quality.

Scores were not available in the sources read for this report, so only published ranks are drawn. The full table, with scores and bands for every country, is at ef.com/epi. Japan's score was not stated in the source read.

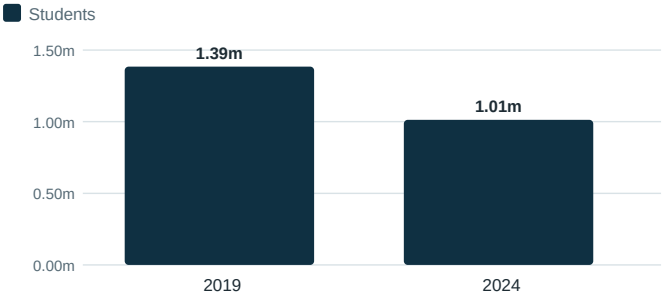
SECTION 3

English language study travel: demand from abroad

> **Has international demand recovered?** Not fully. In 2024 the eight major English-language study destinations hosted about 1.01 million students, 73% of the 2019 total, and 7.6 million student weeks, 75% of 2019 (EnglishUK global overview, 2025). Ireland and Malta are the two destinations that passed their 2019 student weeks.

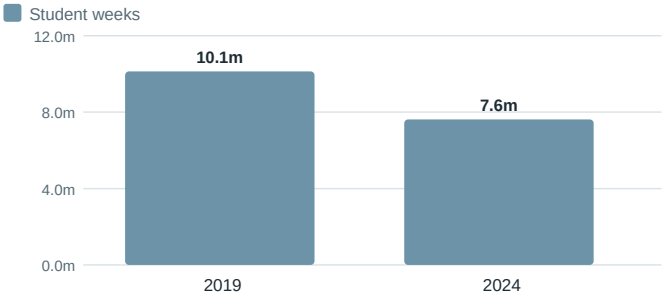
Students

Millions, eight destinations

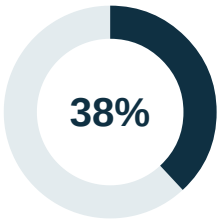


Student weeks

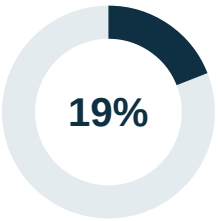
Millions, eight destinations



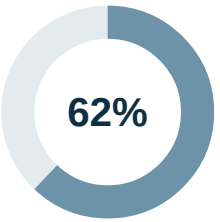
Source: EnglishUK, 2025 Global ELT Overview, 2024 annual statistics. Totals are the source's extrapolations across all centres, not headcounts: 1,012,800 students and 7,620,909 student weeks in 2024 against 1,384,765 and 10,128,570 in 2019.



UK share of students
of all ELT students, 2024



UK share of weeks
of all student weeks, 2024



UK junior share
junior to adult 62:38

What moved in 2024

- **The UK remained the leading destination by student numbers** despite a decline, with 38% of all ELT students but only 19% of student weeks, because its mix is the most junior of any destination (62% junior).
- **Australia recorded the most student weeks** for the third year running.
- **Brazil became the largest source market,** with numbers down 14%. Colombia fell 28%, attributed to high visa fees and low Australian visa approval rates.
- **Ireland and Malta** are the only destinations the source reports as above their pre-pandemic student weeks.

Why this matters for teachers: these are the students sitting in English-language schools abroad, the learners that English-language schools in those countries teach. Student weeks are the closest published proxy for teaching volume. They say nothing about pay.

SECTION 3

Ireland: a destination for English learners

How is Ireland's English language sector doing? English Education Ireland's annual report for 2025, reported by ICEF Monitor on 18 June 2026, counted 124,789 students, up 2%, but only 609,734 student weeks, down 18%. Average length of study fell from 6.4 weeks in 2024 to 4.9 weeks in 2025. The sector contributed €817.6 million.

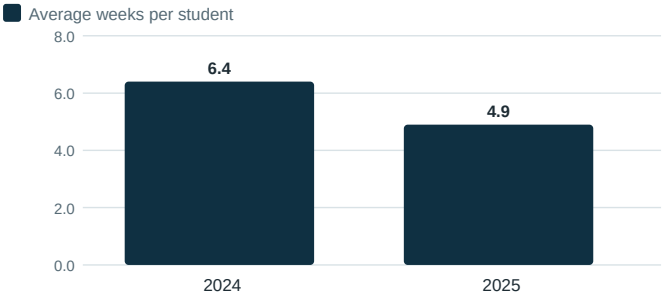
124,789
Students in 2025
Up 2% on 2024

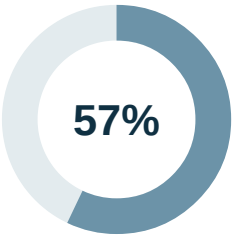
609,734
Student weeks in 2025
Down 18% on 2024

4.9 weeks
Average length of study, 2025
6.4 weeks in 2024

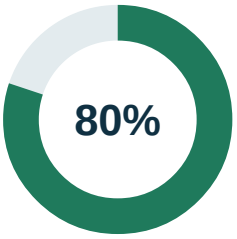
€817.6m
Economic contribution
English Education Ireland, 2025 report

Average length of study
Weeks per student





Junior share of students
enrolments, 2025



Adult share of weeks
student weeks, 2025

Who came

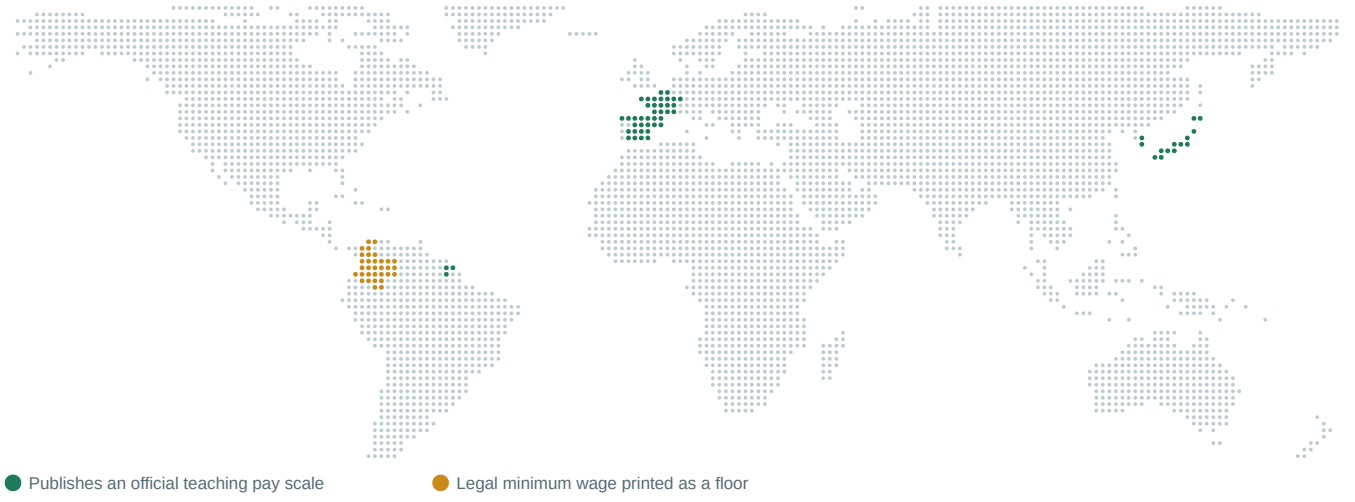
- **Italy is the largest market,** with 47,693 students, up 5%. That is about 38% of all students (derived: 47,693 of 124,789).
- **Japan is the fastest growing of the top markets:** adult enrolments up 47%, junior enrolments up 59%.
- **The ten largest source markets accounted for 80% of students.**
- **Juniors are 57% of enrolments but only 20% of student weeks;** adults generated 80% of student weeks, which is why a fall in average stay moves the weeks figure so sharply.

For readers of the Irish edition, this is the home market: the language schools whose enrolments these figures count are the Irish employers of TEFL teachers, and student weeks, down 18%, are the closest published measure of how much teaching they delivered. The report does not say how many teaching posts that represents.

Source: English Education Ireland, Annual Report on English Language Training in Ireland 2025, as reported by ICEF Monitor, 18 June 2026. Read from the secondary report on 12 November 2026; the body's own report was not read directly. The 2024 comparison with 2019 comes from EnglishUK (previous page).

SECTION 4

Government programmes that publish their pay

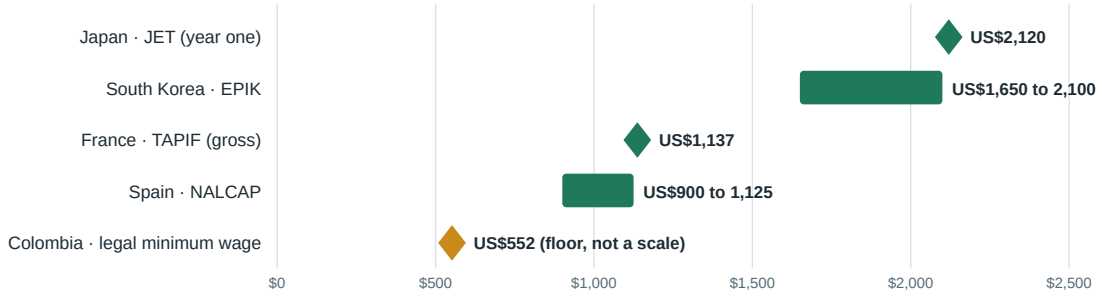


JET (Japan), EPIK (South Korea), TAPIF (France), NALCAP (Spain). Map: Natural Earth (public domain).

Which programmes publish an official salary? Four. JET pays ¥4.02 million in year one, rising to ¥4.14 million in year two. EPIK pays 2.2 to 2.8 million won a month on its main scale, with a furnished apartment, severance pay and airfare. TAPIF pays €1,010.67 a month gross, about €810 net, for up to 12 hours a week from October to April. NALCAP pays €800 to €1,000 a month for 14 to 16 hours a week. No other route has an official scale.

Official monthly pay by programme, in US dollars

Verified on each programme's own page 17 October 2026. Conversions at ECB reference rates of 16 October 2026.



Colombia is the statutory minimum wage printed as the floor to check an academy offer against; it is not a teaching programme.

What each programme adds on top of the pay

Programme	Hours	Housing and extras	Read it as
JET	Full-time, one-year contract	Own housing cost	The highest official cash pay; rent is yours
EPIK	Full-time, one-year contract	Furnished apartment, severance, airfare	Lower headline than JET; often more kept in a city
TAPIF	Up to 12 hours a week, Oct to Apr	None stated in the sources checked	A part-time assistant stipend: a funded year abroad
NALCAP	14 to 16 hours a week, 1 Nov to 31 May	Medical insurance	A part-time assistant stipend, not a living wage

Two points follow. First, the highest official cash pay is JET's, but EPIK provides the apartment and JET does not, so a teacher who would otherwise pay city rent in Korea often keeps more of an EPIK salary than of a JET one. Second, TAPIF and NALCAP are stipends for part-time work and should be read as a funded year abroad, not a living wage. The March 2026 edition mixed all of these with market ranges without saying which were official; this edition marks every figure.

SECTION 4

Programme pay and application windows: the data block

CANONICAL DATA BLOCK · OFFICIAL PROGRAMME PAY AND WINDOWS

Verified on each programme's own page on 17 October 2026. US dollar conversions at European Central Bank reference rates of 16 October 2026. Application windows as published on that date; check the programme page before applying.

Programme	Official pay (local)	About, USD	Hours and term	Application status, 17 Oct 2026	Source
Japan · JET Official	¥4.02 million a year in year one; ¥4.14 million in year two	US$2,120 a month (year one)	Full-time, one-year contracts	Open. Closes 5 November 2026 (UK), 13 November 2026 (US and Canada)	CLAIR scale, via JET Program USA; Embassy of Japan in the UK; JET Programme Canada
South Korea · EPIK Official	2.2 to 2.8 million won a month on the main scale at the levels currently hiring; Chungbuk 2.9 and 3.0 million at two higher levels	US$1,650 to US$2,100 a month	Full-time, one-year; furnished apartment, severance, airfare	Open, rolling, no closing date; Spring 2027 intake reviewed in order of arrival	EPIK salary and benefits page, dated 4 May 2026
France · TAPIF Official	€1,010.67 a month gross; about €810 net	US$1,137 a month gross	Up to 12 hours a week, October to April	Open 15 October 2026 to 15 February 2027; US$149 fee; ages 20 to 35; B1 French	Villa Albertine, TAPIF page
Spain · NALCAP Official	€800 to €1,000 a month by region	US$900 to US$1,125 a month	14 to 16 hours a week, 1 Nov to 31 May; medical insurance	Closed. Last call 2 to 30 June 2026; no next date published	Spanish Ministry of Education, programme call
Colombia · legal floor Official	Minimum wage 1,750,905 pesos a month (2026)	US$552 a month	Statutory minimum, not a teaching scale	Not a programme; printed as the floor for an academy offer	Government of Colombia, 2026 minimum wage decree

How the figures were corrected

The 17 October 2026 verification corrected EPIK's lower figure from 2.1 to 2.2 million won a month: the 2.1 million rate is EPIK's Level 3, and EPIK's own page states that the provincial offices are not currently hiring at that level. The Chungbuk figures of 2.9 and 3.0 million won apply at two higher levels only and are shown separately from the main scale.

Dollar conversions

US dollar values are conversions at the European Central Bank reference rates of 16 October 2026 and will have moved since. The local-currency figure is the one the programme publishes; the dollar figure is for comparison only. Official pay is quoted before the teacher's own tax unless the programme says otherwise: TAPIF's €1,010.67 is gross, with about €810 net published by the programme.

Application windows change; JET's UK window closed on 5 November 2026 and its US and Canada window closes on 13 November 2026, as published on the dates above. Always check the programme's own page.

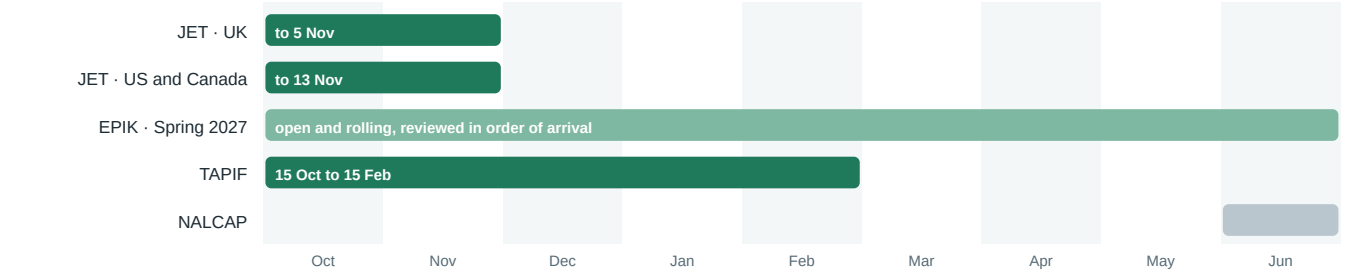
SECTION 4

When to apply: the 2026–27 application calendar

> **Which programmes are open?** As published on 17 October 2026, JET was open until 5 November (UK) and 13 November (US and Canada); EPIK was open and rolling for its Spring 2027 intake; TAPIF was open from 15 October 2026 to 15 February 2027; NALCAP was closed with no next date published.

Application windows, October 2026 to June 2027

As published on each programme's own page on 17 October 2026. NALCAP's last call was 2 to 30 June 2026; no next date published.



Check the programme page before applying; windows and deadlines change.

The JET Programme in numbers

5,933
Participants arriving in FY2025
Japan Ministry of Internal Affairs and Communications (Soumu)

54
Participating countries, FY2025
Soumu, FY2025 overview

80,679
Cumulative participants since FY1987
Soumu, through FY2025

Headcounts for the other three programmes were not checked, so no comparison is drawn. JET's FY2025 intake of 5,933 participants came from 54 countries, and the cumulative total since the programme began in FY1987 is 80,679. The sources checked do not give a breakdown by role (assistant language teacher or otherwise) or a change on the previous year, so neither is shown.

What the calendar means for an applicant

- **The windows do not line up.** JET's windows close in early and mid November and are the first to shut; TAPIF stays open to mid-February; EPIK has no closing date, so the order of arrival matters.
- **Closed does not mean over.** NALCAP's last published call was in June 2026 and the next date has not been published; applicants should watch the Ministry's page rather than assume a date.
- **Costs differ.** TAPIF charges a US$149 application fee and sets an age range (20 to 35) and a B1 French requirement; the other programmes' fees were not stated in the sources checked.

JET's start month was not stated in the sources checked.

SECTION 4

The four programmes side by side

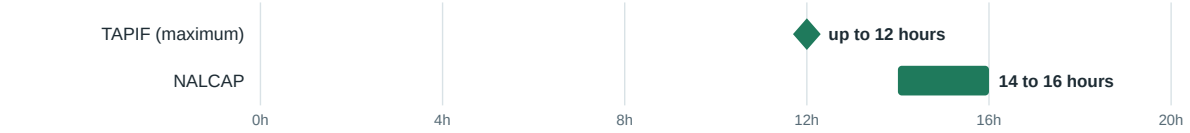
How do the four compare? They are not like for like. JET and EPIK are full-time, one-year jobs; TAPIF and NALCAP are part-time assistant stipends. Housing, hours and eligibility differ more than pay does, and the matrix below sets out only what the programmes' own pages publish.

	JET (Japan)	EPIK (South Korea)	TAPIF (France)	NALCAP (Spain)
Pay, local currency	¥4.02m a year (year 1); ¥4.14m (year 2)	2.2 to 2.8m won a month	€1,010.67 gross a month	€800 to €1,000 a month
Pay, USD a month	2,120	1,650 to 2,100	1,137 gross	900 to 1,125
Hours	Full-time	Full-time	Up to 12 a week	14 to 16 a week
Term	One-year contracts	One-year contracts	October to April	1 November to 31 May
Housing	Own cost	Furnished apartment	Not stated	Not stated
Other benefits	Not stated	Severance pay; airfare	Not stated	Medical insurance
Eligibility stated	Not stated in sources checked	Level-based pay scale	Ages 20 to 35; B1 French	Not stated in sources checked
Fee	Not stated	Not stated	US$149	Not stated
Window, 17 Oct 2026	Closes 5 Nov (UK); 13 Nov (US, Canada)	Rolling; Spring 2027 intake	15 Oct 2026 to 15 Feb 2027	Closed; last call June 2026

Green marks a feature that adds to the package; red marks a cost or a gap an applicant should plan for; amber marks a part-time stipend. "Not stated" means the sources read on 17 October 2026 did not publish it; it does not mean the programme has none.

Weekly hours on the two assistant schemes

Hours a week as published on each programme's page



JET and EPIK are full-time contracts and no weekly hours are published in the sources checked.

Reading across

The honest comparison is the pay a teacher keeps. A teacher on EPIK in a city pays no rent, while a teacher on JET pays their own; the matrix shows that difference as a column and the pay chart as a number, and neither makes EPIK the better job for every applicant. For the two assistant schemes the question is different: whether a part-time stipend plus time to travel, study or tutor is worth a year, which only the applicant can answer. What the matrix prevents is comparing a stipend with a salary as if they were the same thing.

SECTION 5

Qualifications employers can verify

Which TEFL qualification can an employer check? A regulated one. A qualification on the Ofqual Register of Regulated Qualifications carries a number any employer can search, with its guided learning hours, total qualification time and awarding body. The Level 5 Diploma in TEFL (610/1571/4) and the Level 5 Advanced Diploma in TEFL (610/1573/8), both awarded by Highfield Qualifications, are regulated in this way. A 120-hour certificate without a regulator behind it cannot be verified beyond the provider's own word.

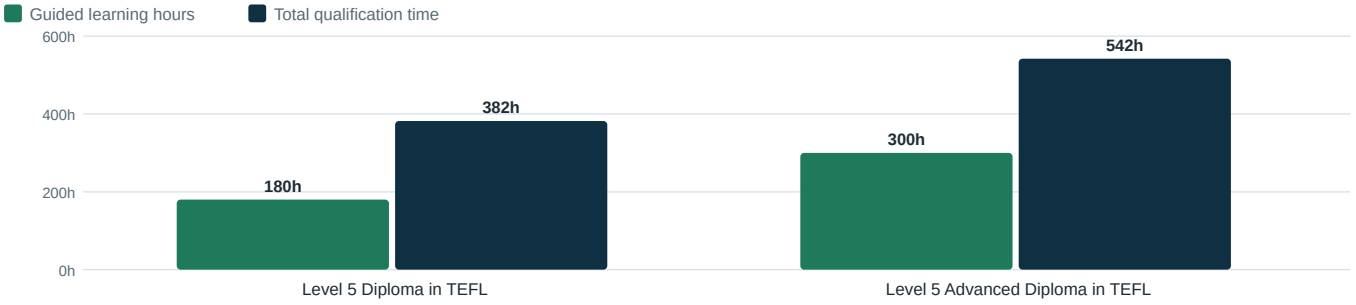
CANONICAL DATA BLOCK · REGULATED QUALIFICATION REFERENCES

Confirmed by hand against the Ofqual Register of Regulated Qualifications on 1 September 2026. The register (gov.uk/find-a-regulated-qualification) blocks automated checking, so it is named rather than linked.

Qualification	Number	Level	Guided learning	Total qualification time	Credits	Awarding body
Level 5 Diploma in TEFL	610/1571/4	RQF Level 5	180 hours	382 hours	—	Highfield Qualifications, RN5219
Level 5 Advanced Diploma in TEFL	610/1573/8	RQF Level 5	300 hours	542 hours	54	Highfield Qualifications, RN5219

Hours on the Ofqual register

Guided learning hours (taught or supervised time) against total qualification time (including private study and assessment)



Source: Ofqual Register of Regulated Qualifications, confirmed by hand 1 September 2026. The usual employer minimum of 120 hours (below) is a different measure and not directly comparable.

Where Level 5 sits

Level 1	Level 2	Level 3	Level 4	**Level 5 RQF and EQF**	Level 6	Level 7	Level 8

RQF Level 5 is referenced to EQF Level 5, the framework used by the 27 EU member states and a further group of participating countries. The March edition's claim that Level 5 is "recognised across 39 countries" is withdrawn because no single source supports it as a statement about employer recognition. The two diplomas are separate specifications and are not to be combined.

The practical difference is verification. A regulated qualification can be searched by number on a public register by any employer; a certificate with no regulator can be confirmed only by the provider that issued it. The usual minimum employers ask for is 120 hours of TEFL training (Section 5, requirements by region), and a regulated Level 5 qualification exceeds that on both guided learning hours and total qualification time.

SECTION 5

What employers ask for, by region

What do employers actually require? Almost everywhere: a TEFL certificate of about 120 hours and a background check. The variable is the degree. It is a legal requirement for the work visa in East Asia and most of the Gulf, preferred in much of Southeast Asia, and usually unnecessary for EU citizens working in the EU or in much of Latin America.

Region	TEFL hours usually asked	Degree	Background check	Other
East Asia (China, Japan, Korea)	120 minimum	Bachelor's, any field, required for the work visa	Yes	Health check; apostilled documents
Southeast Asia	120 preferred	Preferred; enforcement varies by country	Yes	Varies by country
Middle East	120 or more	Bachelor's, often in a relevant field; teaching licence for schools	Yes	Medical; experience usually required
Europe, EU citizens	120	Not usually required	Yes (Garda vetting in Ireland; DBS in the UK)	EU citizenship suffices for work rights
Europe, non-EU citizens	120	Usually required for a visa	Yes	Employer sponsorship needed
Latin America	120 preferred	Not usually required	Varies	Spanish helpful
Online platforms	TEFL certificate	Varies by platform	Some platforms	Equipment and a demo lesson

Compiled March 2026 from provider and recruiter guidance (GoOverseas, Teach Away); not official rules. Green: not usually a barrier. Amber: varies. Red: required or usually required. Check the employer and the embassy.

Key terms used in this report

Term	Meaning
TEFL	Teaching English as a Foreign Language: teaching English to learners in a country where it is not the main language. TESOL is the wider term for teaching English to speakers of other languages.
ELT	English language training or teaching, the market category Market.us sizes at US$89.5 billion for 2024.
Ofqual-regulated	Listed on the Ofqual Register of Regulated Qualifications with a qualification number, level, guided learning hours and awarding body that any employer can check.
RQF and EQF	The Regulated Qualifications Framework (England) and the European Qualifications Framework. RQF Level 5 is referenced to EQF Level 5.
Guided learning hours (GLH)	Hours of taught or supervised learning. **Total qualification time (TQT)** adds private study and assessment.
CEFR	The Council of Europe's Common European Framework of Reference for Languages, six levels from A1 to C2 used in job advertisements.
CAGR	Compound annual growth rate: the steady yearly rate that takes a value from its start to its end figure.
Apostille	A certificate that legalises a public document, such as a degree or background check, for use in another country.
Official, estimate, survey	This report's three bases: read at source and dated; compiled from job listings and guides; or a survey result or derived figure.

Documents that slow applications down

- **Apostilled documents** in East Asia: degree certificates and background checks that must be legalised before a visa can be issued; allow time for this before the visa processing times in Section 9 begin.
- **Medicals** in the Gulf, and health checks in East Asia.
- **Vetting for working with children:** Garda vetting in Ireland and a DBS check in the UK, which are issued in the home country and not on arrival.

SECTION 5

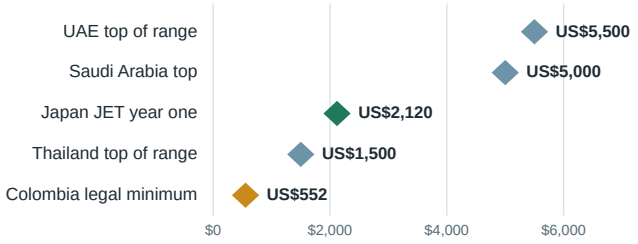
Seven checks before you accept a teaching offer

> **How do you test an offer?** Use the evidence in this report. Each check below points to the page that supports it, and none depends on trusting a recruiter's marketing.

#	Check	Why it matters	Where in this report
1	**Is the qualification regulated?**	A regulated qualification has a number on the Ofqual register with its hours and awarding body; an unregulated certificate can be confirmed only by its provider.	Section 5, qualifications
2	**Is the pay official or an estimate?**	Only JET, EPIK, TAPIF and NALCAP publish a scale. Every other figure is a school's offer and should be compared with the market range and, where one is printed, the legal minimum wage.	Sections 4 and 6
3	**What is included in the pay?**	Housing, tax and flights change the real value more than the headline does: EPIK provides an apartment, JET does not; Gulf salaries are tax-free.	Section 6, pay against cost of living
4	**Who sponsors the visa, and what does it require?**	The visa, not the employer, sets the minimum qualifications, and in most of East Asia and the Gulf it requires a bachelor's degree.	Section 9, visas
5	**What are the hours?**	The assistant schemes are part-time stipends (up to 12 hours a week on TAPIF, 14 to 16 on NALCAP), not full-time salaries.	Section 4, programme matrix
6	**Is the window open?**	Windows close and move; read the programme's own page and not a third-party summary, including this one.	Section 4, calendar
7	**Is the season right?**	Many European academies teach September to June, French and Spanish programmes October or November to April or May; a start date outside the season may mean no work.	Section 6, teaching seasons

Test an offer against these

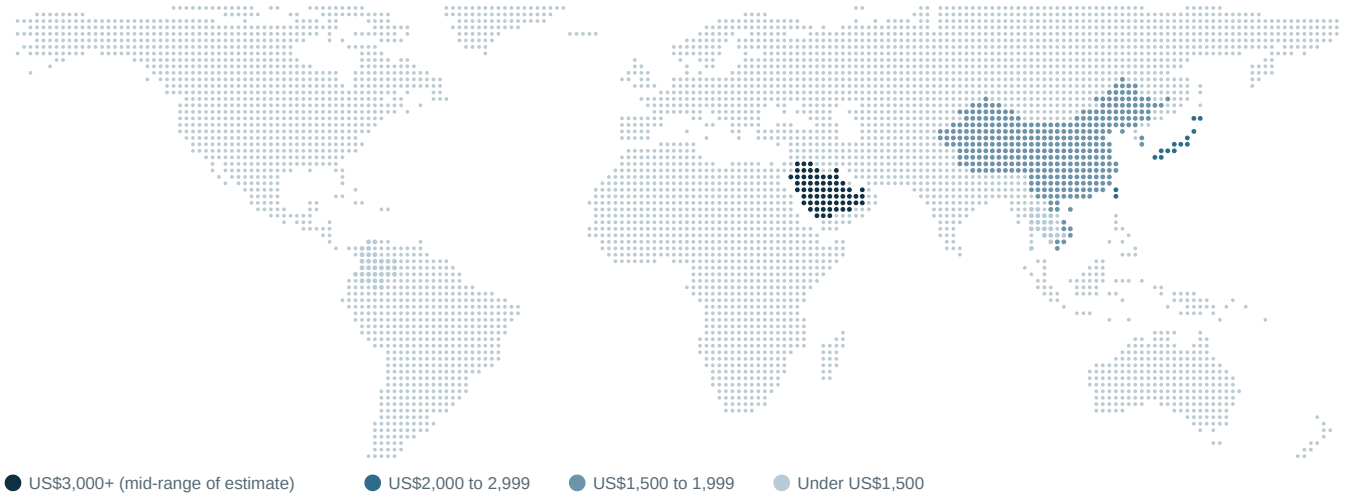
US$ a month; ceilings and floors from Section 6



How to use the chart. If an offer is above the top of the market range for the country, ask what is being traded for it: more hours, a remote location, or a role that is not teaching. If it is below the legal minimum wage, it is not lawful in that country. The ranges are estimates from March 2026 job listings, so treat a mismatch as a question to ask, not as proof of a problem.

SECTION 6

Salary guide: official scales and market estimates

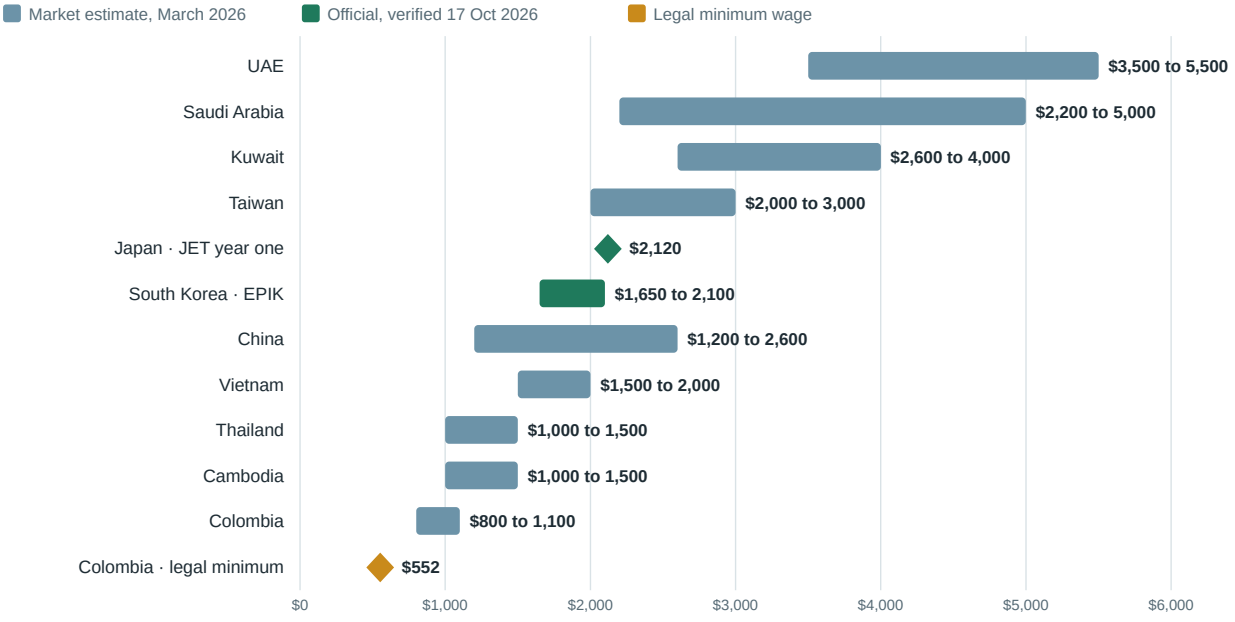


Midpoint of each destination's monthly pay range (derived; market estimates March 2026 and official JET figure). Europe is shown in euros on page 22 and not coloured here.

How much do English teachers earn abroad? The only figures a teacher can hold an employer to are the four official scales in Section 4. For everywhere else, market estimates compiled from job listings in March 2026 put the Gulf at US$2,200 to US$5,500 a month tax-free, East Asia at roughly US$1,200 to US$3,000, Southeast Asia at US$1,000 to US$2,000, Europe at €800 to €2,200 and Latin America at US$800 to US$1,100.

Monthly pay for a TEFL teacher, US dollars

Market estimates compiled March 2026 from job listings; official rows verified 17 October 2026. Gulf figures are tax-free; Korea's EPIK figure excludes the provided apartment.



Sources: GoOverseas, International TEFL Academy and ESLstarter (estimates, not re-verified); EPIK, CLAIR and Colombian decree (official).

Reading the chart

- **Cash is highest in the Gulf** (US$2,200 to US$5,500 tax-free, usually with housing), then Taiwan, Japan and Korea; Southeast Asia and Latin America pay less in dollars but cost less to live in (next pages).
- **The widest ranges are the least precise.** A range of US$2,200 to US$5,000, as in Saudi Arabia, reflects very different jobs: school posts, university posts and recruiter packages are not the same offer.
- **Every bar is a market estimate except the green ones.** The estimates come from job listings, which show asking pay and not what teachers are actually paid.

Estimates compiled March 2026 from GoOverseas, International TEFL Academy and ESLstarter listings; not re-verified for this edition. Official rows verified 17 October 2026. Specialist roles (business English, exam preparation) pay above these ranges.

SECTION 6

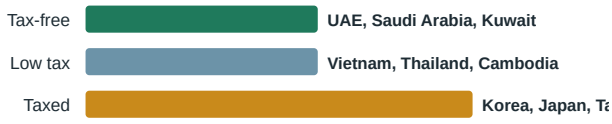
Highest-paying destinations: the data block

Country	Monthly pay (USD)	Tax	Housing	Cost of living (USD/mo)	Degree	Basis
UAE	$3,500–5,500	Tax-free	Often included	$1,200–1,900	Yes	Market estimate
Saudi Arabia	$2,200–5,000	Tax-free	Usually included	$800–1,400	Yes	Market estimate
Kuwait	$2,600–4,000	Tax-free	Usually included	$700–1,200	Yes	Market estimate
South Korea	$1,650–2,100 on EPIK's main scale; academies vary	Taxed	Provided on EPIK	$800–1,200	Yes	Official (EPIK) / estimate
Japan	$2,120 on JET year one; private schools vary	Taxed	Own cost on JET	$1,000–1,500	Yes	Official (JET) / estimate
Taiwan	$2,000–3,000	Taxed	Not included	$700–1,000	Yes	Market estimate
China	$1,200–2,600	Taxed	Often provided	$500–1,000	Yes	Market estimate
Vietnam	$1,500–2,000	Low	Not included	$500–800	Preferred	Market estimate
Thailand	$1,000–1,500	Low	Not included	$600–900	Preferred	Market estimate
Cambodia	$1,000–1,500	Low	Not included	$400–700	No	Market estimate
Colombia	$800–1,100; legal minimum $552	Taxed	Not included	$500–700	No	Estimate / official minimum

Market estimates compiled March 2026 from GoOverseas, International TEFL Academy and ESLstarter listings; not re-verified for this edition. Official rows verified 17 October 2026.

Tax treatment of the 11 destinations

Number of destinations in the table



Tax is a column, not a footnote. Eleven destinations are shown. Three are tax-free on teaching income (the Gulf states), three are described as low-tax (Cambodia, Thailand, Vietnam) and five are taxed (Korea, Japan, Taiwan, China, Colombia). The same headline salary therefore means different amounts in the pocket.

What you keep, not what you are paid

Dublin's average monthly rent is above €2,100 (March 2026 compilation; not an official statistic and not re-verified). A teacher on EPIK in Seoul pays no rent, a teacher in Dubai is usually housed and pays no income tax, and a teacher in Ho Chi Minh City or Bangkok rents for a few hundred euros. The practical comparison is the net position after rent and tax, which is why housing and tax sit beside every salary. A graduate paying Dublin rent has a direct incentive to spend a year where the employer provides the apartment. The March edition's claim that first-time teachers in Asia "save 30 to 50% of their salary" came from a provider's marketing page and is withdrawn.

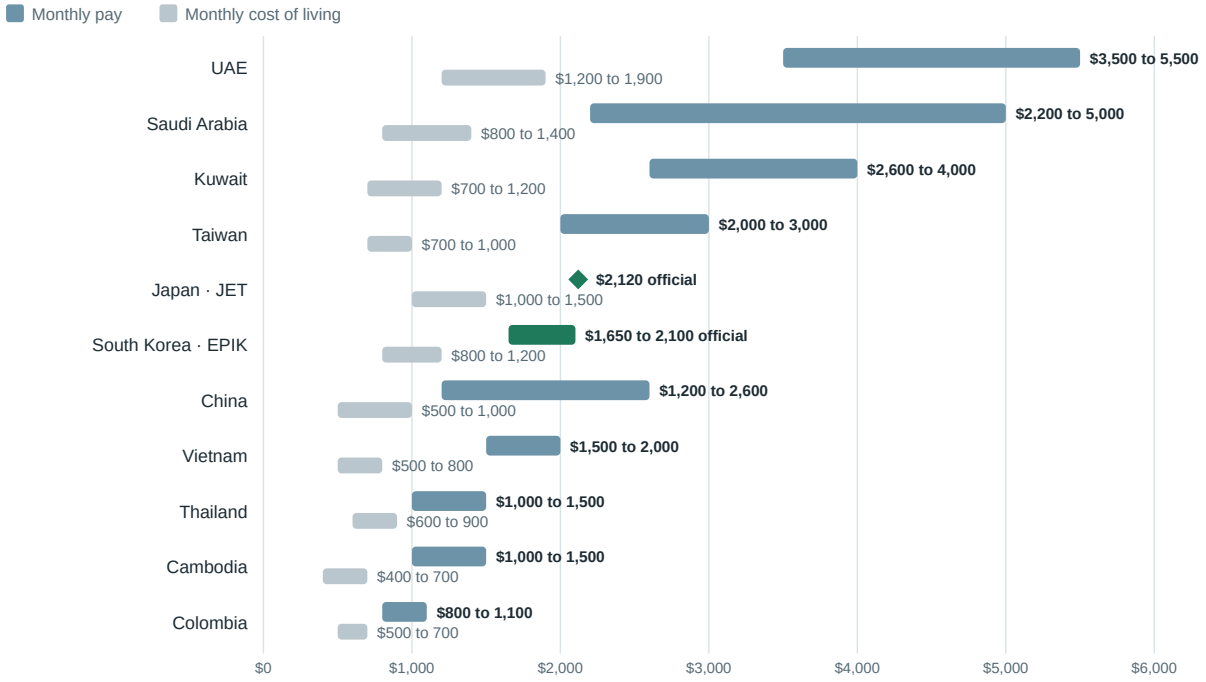
SECTION 6

Pay against cost of living, outside Europe

What does the pay buy? The comparison that matters is pay set against the cost of living, with housing and tax in view. The Gulf shows the widest gap between pay and living costs on these estimates; Southeast Asia combines mid-range pay with some of the lowest living costs; the official Japanese and Korean figures sit above their living-cost ranges but are taxed.

Monthly pay against monthly cost of living, US dollars

Blue: market estimate (March 2026). Green: official pay (17 October 2026). Grey: estimated monthly cost of living.



Source: GoOverseas, International TEFL Academy, ESLstarter (estimates, not re-verified); EPIK and CLAIR (official).

Three cautions before reading a gap as savings

- **The ranges overlap in places.** A low-end Gulf salary and a high-end living cost nearly meet; the chart shows ranges, not a typical teacher.
- **Cost of living is a single estimate.** It does not separate rent from food from travel, and it does not include flights home, visa costs or savings.
- **Housing changes the picture.** Where the employer provides the apartment (EPIK, often China and the Gulf), the cost-of-living bar overstates what the teacher pays.

No savings rate is claimed. The March 2026 edition's "30 to 50% saved" figure is withdrawn (Section 11).

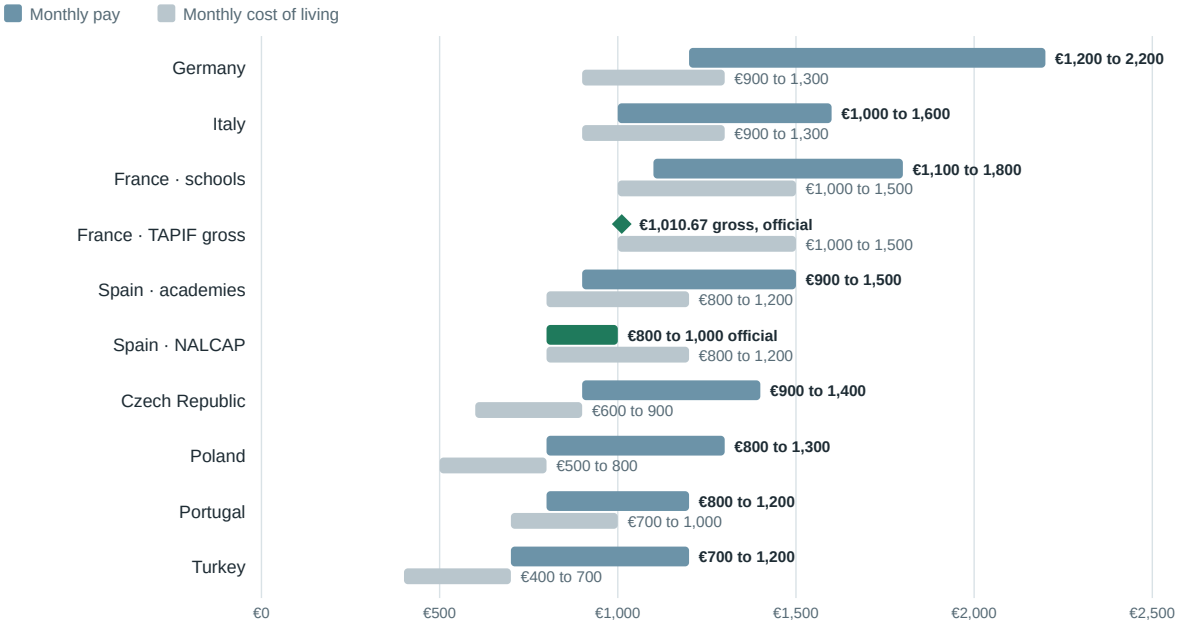
SECTION 6

Europe: salary against cost of living

What is Europe like for an EU citizen? No visa is needed, but pay is lower than in East Asia and the Gulf, and most countries leave modest room after living costs. Germany pays the most on these estimates (€1,200 to €2,200 a month); Poland and the Czech Republic combine lower pay with lower living costs; the two official assistant schemes in France and Spain sit at the bottom of the range.

Monthly pay against monthly cost of living, euros

Blue: market estimate (March 2026). Green: official (17 October 2026). Grey: estimated monthly cost of living.



Source: GoOverseas, Teach Away and listings compiled March 2026 (estimates, not re-verified); Villa Albertine and Spanish Ministry of Education (official).

Country	Monthly salary	Cost of living	Savings potential	EU work rights	Season
Spain	€900–1,500 (academies); NALCAP €800–1,000	€800–1,200	Low to moderate	No visa needed	Sep to Jun
France	€1,100–1,800 (schools); TAPIF €1,010.67 gross	€1,000–1,500	Low	No visa needed	Oct to May
Germany	€1,200–2,200	€900–1,300	Moderate	No visa needed	Year-round
Italy	€1,000–1,600	€900–1,300	Low to moderate	No visa needed	Sep to Jun
Czech Republic	€900–1,400	€600–900	Moderate	No visa needed	Year-round
Poland	€800–1,300	€500–800	Moderate	No visa needed	Year-round
Portugal	€800–1,200	€700–1,000	Low to moderate	No visa needed	Sep to Jun
Turkey	€700–1,200	€400–700	Moderate	Visa required	Year-round

Market estimates compiled March 2026; euro figures for comparison with home living costs. "Savings potential" is the March compilation's qualitative rating, not a measured rate.

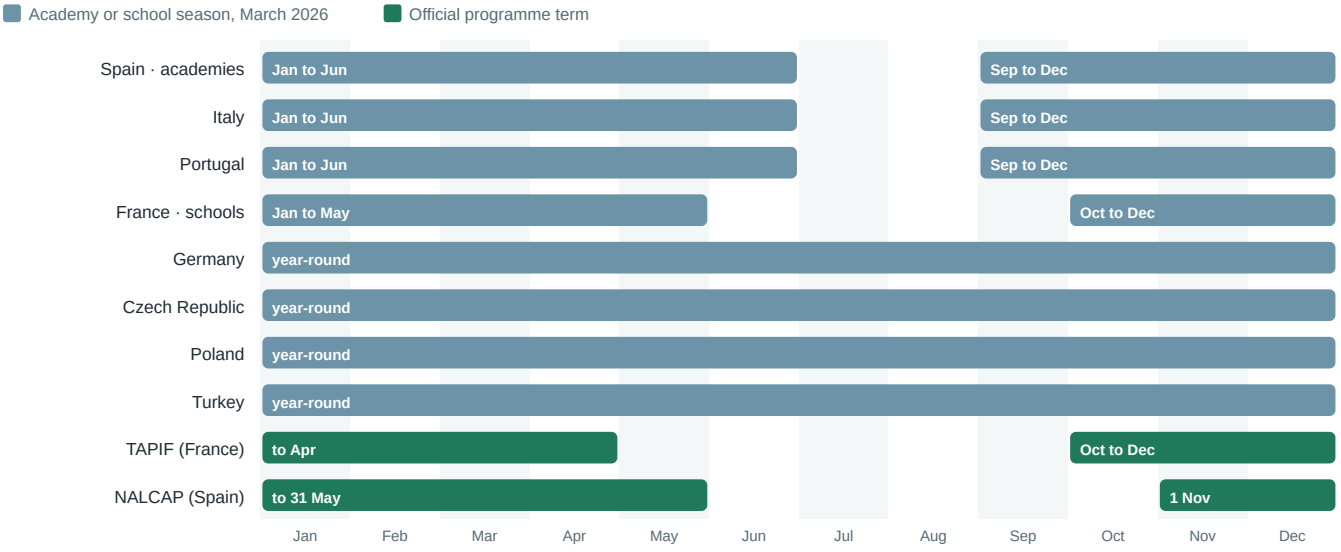
SECTION 6

Teaching seasons: when the work is

> **When can you start?** Much of Southern Europe teaches September to June; the two official assistant schemes run October or November to April or May; Germany, the Czech Republic, Poland and Turkey recruit year-round. A start date outside the season may mean no work.

Teaching seasons in Europe

A calendar year. Blue: season from the March 2026 compilation. Green: official programme term (17 October 2026).



Sources: March 2026 compilation (estimates, not re-verified); Villa Albertine (TAPIF) and Spanish Ministry of Education (NALCAP).

What the calendar changes

- **Seasonal markets reward early applications.** A teacher starting in September competes with the whole intake; one starting in January often finds fewer posts and no induction.
- **The assistant schemes bracket the winter.** TAPIF runs October to April and NALCAP 1 November to 31 May, so both end before the summer teaching season and neither covers it.
- **Year-round markets trade pay for access.** Germany, the Czech Republic, Poland and Turkey have no season edge, and are the options on this chart for a mid-year start.

Seasons are the March 2026 compilation's view of the main teaching year; individual schools differ, and summer schools and online work run outside it.

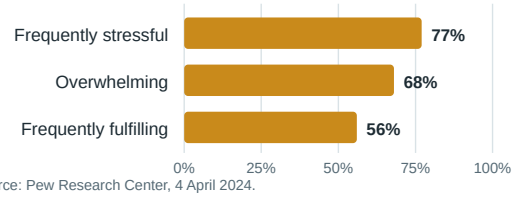
SECTION 7

Who is teaching English abroad

Who is entering the profession? Younger applicants, and more of them. Teach for America reported a 43% rise in incoming corps members over three years and welcomed 2,300 new teachers for the 2025-26 school year (Fortune, 12 January 2026). Deloitte's 2025 survey found 89% of Gen Zs and 92% of millennials consider purpose important to job satisfaction. Neither statistic measures TEFL directly; both describe the generation now applying to it.

How US public teachers describe the job

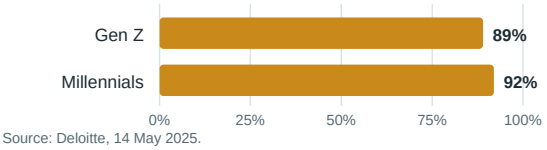
Pew Research Center, 2,531 teachers, Oct to Nov 2023



Source: Pew Research Center, 4 April 2024.

Purpose important to job satisfaction

Deloitte 2025 Gen Z and Millennial Survey, 44 countries



Source: Deloitte, 14 May 2025.

43%

Rise in incoming Teach for America corps members over three years

US, one programme. Fortune, 12 Jan 2026

2,300

New corps members for the 2025-26 school year

Fortune, 12 Jan 2026; The Guardian, 2 Jan 2026

2,531

US public K-12 teachers surveyed by Pew

Survey 17 Oct to 14 Nov 2023

44

Countries in the Deloitte 2025 survey

Deloitte, 14 May 2025

CANONICAL DATA BLOCK · THE APPLICANT POOL

Each figure checked against the publisher's own page on 1 November 2026.

Figure	Value	Population measured	Source and date
Rise in incoming Teach for America corps members	43% over three years; 2,300 new members in 2025-26	US, one programme	Fortune, 12 Jan 2026; The Guardian, 2 Jan 2026
Purpose important to job satisfaction	89% of Gen Zs, 92% of millennials	Global survey, 44 countries	Deloitte 2025, 14 May 2025
Job frequently stressful / overwhelming / frequently fulfilling	77% / 68% / 56%	2,531 US public K-12 teachers	Pew Research Center, 4 April 2024

The March edition's table of 2020 and 2026 teacher profiles (career changers, online-only teachers, Level 5 holders) had no source and is withdrawn. What the sources support is narrower: applicants are younger, say purpose matters to them, and enter a profession that reports high stress alongside a majority who find it fulfilling. The Pew teachers are US public school teachers, not TEFL teachers abroad.

SECTION 8

AI in English language teaching

Is AI replacing English teachers? Not on the evidence available. A 2025 peer-reviewed study in ScienceDirect found that combining ChatGPT with teacher feedback improved EFL learners' argumentative writing, and that the teacher's feedback made the difference. The tools in use are assistants for planning, differentiation, feedback and pronunciation practice, and the training market grew through the period in which they arrived.

Application	Typical tools	What the teacher still does	Effect on the lesson
Adaptive practice	Duolingo, Busuu, Babbel	Sets the curriculum; assigns practice	Pace and difficulty adjust to the learner
Pronunciation	ELSA Speak, SpeechAce	Coaches; checks the feedback	Immediate feedback on individual sounds
Writing feedback	ChatGPT, Grammarly, Write & Improve	Validates feedback; analyses errors	Faster first-pass correction
Assessment	Pearson Versant, ETS automated scoring	Interprets results; tracks progress	Consistent, rapid grading
Lesson planning	ChatGPT, Claude, Gemini	Curates; adds creativity	Faster material creation
Conversation practice	Chatbots and role-play tools	Designs the scenario	Low-pressure speaking practice

Descriptive table; no usage statistics are asserted because none with a stated method was found.

Who does what

The tool does

- First-pass correction of written errors
- Adaptive practice at the learner's own pace
- Immediate feedback on individual sounds
- Consistent, rapid grading of set tasks
- Faster draft materials

The teacher does

- Sets the curriculum and chooses the practice
- Validates the feedback and analyses error patterns
- Coaches pronunciation beyond the tool's output
- Interprets results and tracks progress
- Designs the scenario and adds the creativity

What the study found. In the 2025 ScienceDirect study, ChatGPT combined with teacher feedback improved EFL learners' argumentative writing, and the teacher's feedback was the component that made the difference. One study on one skill is not a verdict on the profession; it is the best-evidenced finding this report could cite.

What the evidence does not show

- **No usage rate.** No figure with a stated method was found for how many teachers use these tools, so none is quoted. The March edition's statements that "RAND surveys show AI tools are especially popular among teachers serving English learners" and that "COVID-19 was the major catalyst" are withdrawn for lack of a supporting figure.
- **No effect on pay or demand.** The market data in Section 2 shows the training market growing through the period in which the tools arrived; it does not show whether the tools changed the number of teaching posts.

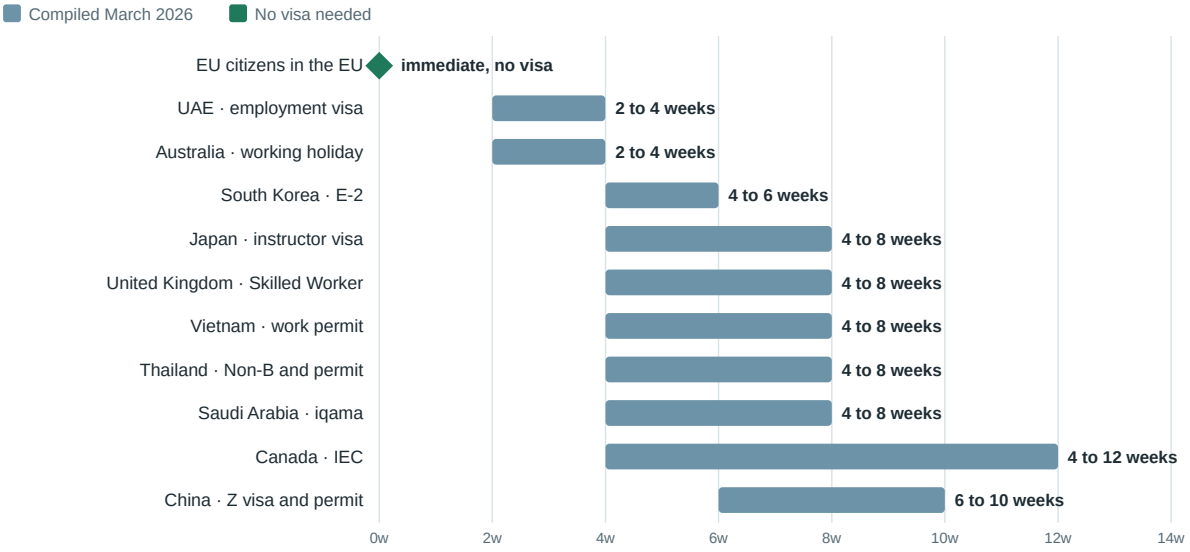
SECTION 9

Visas and work permits

> **Where can a teacher work without a visa?** An Irish citizen can live and work in all 27 EU member states, plus Iceland, Liechtenstein, Norway and Switzerland, without a work visa, and has Common Travel Area rights in the UK. Everywhere else the employer sponsors a work visa, and the visa, not the employer, sets the minimum qualifications.

Typical visa processing time, weeks

Indicative processing times compiled March 2026 from embassy and provider guidance; rules and times change.



Source: embassy and provider guidance compiled March 2026 (not re-verified). Confirm with the embassy before relying on a figure.

Three readings

- **The Gulf and Australia are the fastest,** at 2 to 4 weeks on the March compilation; China is the slowest at 6 to 10 weeks, with Canada's range the widest (4 to 12 weeks).
- **Start the paperwork before you resign.** Apostilled documents and background checks (Section 5) come before the processing times shown, and are the usual cause of delay.
- **Citizenship is the biggest variable.** For an EU citizen working in the EU, processing is immediate; for a UK or US citizen, every destination in this report except their own country needs a visa.

Processing times are indicative and describe the visa step only. They do not include document legalisation, medicals or the employer's own hiring process.

SECTION 9

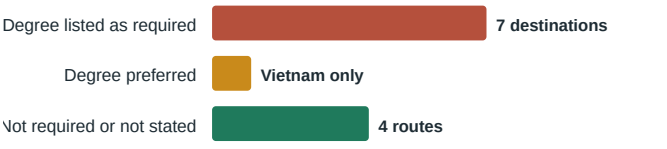
Visa routes: the data block

Destination	Visa route	Typical processing (March 2026)	Key requirements	Note
EU member states	None for EU citizens; national work visa for others	Immediate for EU citizens	EU citizenship, or employer sponsorship	No change published for 2026
United Kingdom	Skilled Worker; Graduate Route	4–8 weeks	Degree; employer sponsor	Graduate Route shortens to 18 months from January 2027 (UK policy, compiled March 2026)
South Korea	E-2	4–6 weeks	Bachelor's; TEFL; apostilled documents	Stable
Japan	Instructor or Specialist in Humanities	4–8 weeks	Bachelor's; employer sponsor	Stable
China	Z visa plus work permit	6–10 weeks	Bachelor's; TEFL; two years' experience or a master's	Tighter enforcement
Vietnam	Work permit plus temporary residence card	4–8 weeks	Bachelor's preferred; TEFL	Degree enforcement varies
Thailand	Non-B visa plus work permit	4–8 weeks	Bachelor's; TEFL	Stable
UAE	Employment visa	2–4 weeks	Bachelor's; TEFL; employer sponsor	Stable
Saudi Arabia	Work visa (iqama)	4–8 weeks	Bachelor's; TEFL; experience	Stable
Australia	Working Holiday (subclass 417) for eligible nationalities	2–4 weeks	Age limits apply by nationality	Check the Department of Home Affairs for current age limits
Canada	International Experience Canada working holiday	4–12 weeks	Age 18–35 for most partner countries	Reduced migration targets announced to 2027
Colombia	Work visa; tourist entry for short stays	Varies	TEFL preferred; degree not required	Stable

Compiled March 2026 from embassy and provider guidance; processing times are indicative. Rules change; confirm with the embassy before relying on a row.

Does the visa guidance require a degree?

Count of the 12 destinations and routes in the table. Required: UK, Korea, Japan, China, Tha



The degree is the gate. In the table above, every route to East Asia, the Gulf and the UK lists a bachelor's degree, and so does Thailand's guidance, though the salary table in Section 6 lists a degree there as preferred and enforcement varies. Vietnam is listed as degree preferred. Colombia needs none, the Australian and Canadian working-holiday routes depend on age and nationality, and EU citizens working in the EU need no visa. For an applicant without a degree, the realistic options are the EU (with EU citizenship), Latin America, parts of Southeast Asia and online work.

Policy dates to watch

- **January 2027:** the UK Graduate Route shortens to 18 months (UK government policy, compiled March 2026), which affects recent UK graduates teaching in the UK.
- **To 2027:** Canada's reduced migration targets, announced to 2027, may affect International Experience Canada places.

SECTION 10

Where the market is going

What grows fastest to 2030? On the published forecasts, the digital and online segments: digital English language learning at roughly 16% a year (Research and Markets, 2025 to 2030) against 7.3% for the market as a whole (Market.us, 2025 to 2034). Specialised English (business, exam preparation, academic and medical English) is where private rates are highest, and government programmes in Asia and Europe remain the only part of the market with published, dated pay.

about 2x
Digital segment growth against the whole market
15.8% implied against 7.3%; derived from the Research and Markets and Market.us figures

48%
Online share of ELT by method, 2024
Market.us

4
Government programmes that publish their pay
Section 4, verified 17 Oct 2026

Trend	What it is	Evidence	Opportunity
Digital delivery	Online and hybrid teaching as a permanent share of the market	Online learning was 48% of ELT by method in 2024 (Market.us)	Teaching from home across time zones; specialist niches
Specialised English	Business, IELTS and academic English	Highest advertised private rates (March 2026 listings compilation)	Premium rates for specialist certification
Government programmes	National schemes in Japan, Korea, France and Spain	The only published pay scales (Section 4)	Structured, verifiable employment
Corporate training	B2B language services	Research and Markets forecast (March 2026, not re-verified)	Higher rates; business focus
Study travel	Students travelling to learn English	2024 at 73% of 2019 students; Ireland and Malta above 2019 weeks (EnglishUK)	In-country school posts where demand has recovered
New markets	English tied to economic mobility in Africa and Central Asia	Named in the March edition; no market-size data found	Development and project roles
AI-assisted teaching	Planning, feedback and assessment tools	Section 8	Faster preparation; teacher judgement remains the value

Limits of forecasting

- **Forecasts disagree by definition.** The 2030 and 2034 endpoints come from different publishers using different market definitions; the spread between 6.6% and 7.3% for the overall market, and between 15.8% and 16.9% for digital segments, is the honest range.
- **No 2026 actual exists yet.** The roughly US$100 billion for 2026 is arithmetic on a published growth rate and will be replaced when a publisher releases an actual.
- **Recovery is uneven.** International student numbers in 2024 were still at 73% of 2019 even as Ireland and Malta passed their 2019 weeks; the forecast growth in the training market does not, by itself, mean growth in each country's school sector.

SECTION 11

Corrections ledger: what the March 2026 edition got wrong

This report is published with a standing corrections policy. The following statements in the March 2026 edition were checked and are corrected or withdrawn.

March 2026 statement	Position in this edition	Why
"The global ELT market will reach an estimated $95 billion in 2026"	US$89.5bn in 2024, US$181.1bn forecast for 2034, 7.3% CAGR; roughly US$100bn implied for 2026	Market.us publishes 2024 and 2034 values only; the 2026 figure was an interpolation and understated the publisher's own path
Digital ELL "growing at an 18% CAGR" and "three times the overall ELT rate"	US$12.25bn (2025) to US$25.47bn (2030) implies about 15.8% a year, about twice the overall rate	Arithmetic
"2 billion people are currently learning English" (and elsewhere 1.5 billion)	About 1.5 billion learning; 2.3 billion speak English to some level	British Council figures; the March edition contradicted itself
"88% of teachers say the job is overwhelming"	68%	Pew's published figure is 68%; 77% for frequently stressful stands
"9 in 10 Gen Z workers rank sense of purpose above pay"	89% of Gen Zs consider purpose important to job satisfaction	Deloitte makes no "above pay" ranking
"43% more entering teaching" presented as a TEFL trend	A 43% rise in one US programme's corps members over three years	The figure is Teach for America's, not a TEFL or global measure
TEFL teacher demographics table, 2020 v 2026	Withdrawn	No source
"Recognised across 39 countries" for Level 5	Withdrawn as an employer-recognition claim; Ofqual-regulated, RQF Level 5 referenced to EQF Level 5	No source supports the number
"Teachers in Asia save 30–50% of their salary"	Withdrawn	Provider marketing claim, no method
"Cambodia" listed among Latin American countries	Cambodia is in Southeast Asia	Error
Wellbeing table with 42, 28 and 17 "mentions"	Withdrawn	No stated source or sample
Endnotes 1–42 against a source list of 1–28	One numbered source list (Section 12)	Two numbering systems did not match
All salary ranges presented alike	Every figure marked official or market estimate, with its date	Only four programmes publish pay

Later corrections will be recorded on the Institute's editorial standards page. No figure in this edition has been withdrawn since the 1 November 2026 Q4 edition.

SECTION 12

Methodology

This edition was compiled by the Research Team at The TEFL Institute of Ireland. Official programme pay and application windows were read on each programme's own website on 17 October 2026, as part of the Institute's fortnightly hiring report. Regulated qualification references were confirmed by hand against the Ofqual Register of Regulated Qualifications on 1 September 2026. Market-size figures from Market.us and the survey figures from Pew Research Center, Deloitte and Fortune were checked against the publishers' own pages on 1 November 2026.

The 2027 edition adds four datasets read on 12 November 2026: the EF English Proficiency Index 2025 launch release (EF, primary) and a Nippon.com analysis of it (secondary, for Asian ranks); the EnglishUK 2024 global ELT overview (primary); English Education Ireland's 2025 annual report as reported by ICEF Monitor (secondary); and Japan's FY2025 JET Programme participant numbers (Soumu, primary). Figures carried forward from the March 2026 edition without re-verification are labelled wherever they appear, and every figure that could not be traced to a source has been removed. Derived figures (the implied 2026 market, the implied 15.8% growth rate, Italy's share of Irish students and the "about twice" comparison) are labelled as derived. No figure comes from the Institute's own customer data.

SECTION 12

Sources, citation and disclosure

1. Market.us, English Language Training (ELT) Market Size, 26 August 2025. market.us/report/english-language-training-elt-market
2. British Council, LearnEnglish language table (1.5 billion learners); The Future of English: Global Perspectives (2.3 billion speakers to some level). britishcouncil.org
3. JET Program USA, application and departure page; CLAIR first-year remuneration. jetprogramusa.org/application-departure/ (verified 17 October 2026)
4. Embassy of Japan in the UK, JET Programme application page. uk.emb-japan.go.jp/itpr_en/apply_jet.html (verified 17 October 2026)
5. JET Programme Canada, apply page. jetprogramme.ca/apply/ (verified 17 October 2026)
6. EPIK, salary and benefits, page dated 4 May 2026. epik.go.kr/web/epik/contents/Salarybenefits (verified 17 October 2026)
7. Villa Albertine, Teaching Assistant Program in France. villa-albertine.org/frenchculture/frenchcultures/teach-english-in-france/ (verified 17 October 2026)
8. Spanish Ministry of Education, North American Language and Culture Assistants Program, 2026 call (verified 17 October 2026; no live call page at that date)
9. Government of Colombia, 2026 minimum wage decree (1,750,905 pesos a month)
10. Ofqual, Register of Regulated Qualifications: 610/1571/4 and 610/1573/8, Highfield Qualifications RN5219. gov.uk/find-a-regulated-qualification (confirmed by hand 1 September 2026)
11. Council of Europe, Common European Framework of Reference for Languages. coe.int (checked 1 September 2026)
12. Pew Research Center, What's It Like To Be a Teacher in America Today?, 4 April 2024; survey of 2,531 US public K-12 teachers, 17 October to 14 November 2023. pewresearch.org
13. Deloitte, 2025 Gen Z and Millennial Survey, 14 May 2025. deloitte.com
14. Fortune, In an echo of the Great Recession, Gen Z seeks out Teach for America roles, 12 January 2026; The Guardian, 2 January 2026.
15. The Business Research Company, English Language Training Global Market Report (compiled March 2026, not re-verified)
16. Research and Markets, digital English language learning and online one-to-one platform forecasts (compiled March 2026, not re-verified)
17. GoOverseas, International TEFL Academy and ESLstarter salary and requirements guides (market estimates compiled March 2026, not re-verified)
18. ScienceDirect, study on ChatGPT and teacher feedback in EFL argumentative writing, 2025. sciencedirect.com/science/article/abs/pii/S187118712500015X
19. European Central Bank, euro foreign exchange reference rates, 16 October 2026 (US dollar conversions)
20. EF Education First, EF English Proficiency Index 2025, launch release, 19 November 2025. ef.com/ca/about-us/press/articles/2025/ef-english-proficiency-index-2025-launched/ (read 12 November 2026)
21. Nippon.com, Very Low Proficiency: Japan Drops into Bottom Group in English Ability Ranking (analysis of the EF EPI 2025; secondary source for Asian ranks). nippon.com/en/japan-data/h02620/ (read 12 November 2026)
22. EnglishUK, 2025 Global ELT Overview, 2024 annual statistics. englishuk.com (read 12 November 2026)
23. ICEF Monitor, Ireland's ELT sector reports modest growth in student numbers but weeks are down, 18 June 2026, reporting English Education Ireland's Annual Report on English Language Training in Ireland 2025 (secondary source; read 12 November 2026). monitor.icef.com
24. Japan Ministry of Internal Affairs and Communications (Soumu), FY2025 overview of the JET Programme (participants and countries; read 12 November 2026). soumu.go.jp/menu_news/s-news/01gyosei05_02000239.html

How to cite this report. The TEFL Institute of Ireland, The State of TEFL 2027, 2027 edition, published November 2026, https://tefl.ie/wp-content/uploads/2026/11/state-of-tefl-2027-tefl-ie.pdf. Official programme figures verified 17 October 2026; qualification references confirmed 1 September 2026; additional datasets read 12 November 2026; market estimates compiled March 2026 and labelled as estimates. Corrections are listed in Section 11.

About The TEFL Institute of Ireland

The TEFL Institute of Ireland (tefl.ie) is an Irish TEFL course provider. Its Level 5 Diploma in TEFL and Level 5 Advanced Diploma in TEFL are regulated qualifications awarded by Highfield Qualifications and listed on the Ofqual Register of Regulated Qualifications. The Institute publishes The Hire Wire, a fortnightly report on TEFL hiring, and The State of TEFL, its annual market report.

© 2027 The TEFL Institute of Ireland. This report may be quoted with attribution. Commercial-interest disclosure: The TEFL Institute of Ireland sells TEFL courses, including the regulated qualifications referenced in Section 5; no course is recommended in this report and no salary figure is drawn from the Institute's own data.