



AN INDUSTRY REPORT FROM THE TEFL INSTITUTE GROUP

# The Future of AI in English Language Teaching and TEFL

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How artificial intelligence is reshaping the market, the classroom, assessment and teaching careers, and why the evidence points to teachers with AI, not teachers versus AI.

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*All statistics in this report are drawn from published research and industry data. Numbered sources with full links appear at the foot of each page.*

## Executive summary

Artificial intelligence has moved from the edges of English language teaching to its centre in under three years. In the United States, 60% of public school teachers used AI tools during the 2024-25 school year, and weekly users report saving an average of 5.9 hours per week, the equivalent of about six working weeks per year.<sup>1</sup> Across 118 countries, English language teachers are already using AI for materials creation (57%), learner practice (53%) and lesson planning (43%).<sup>2</sup>

Yet the same evidence shows this is an augmentation story, not a replacement story. A majority of English teachers worldwide (60%) reject the idea that AI translation makes language learning unnecessary, and 51% are sceptical that AI will be able to teach English without a human teacher even by 2035.<sup>2</sup> The British Council's Future of English research programme concludes that teachers will remain central to English learning even as automation increases.<sup>3</sup> Our own State of TEFL 2026 research reaches the same verdict: AI saves TEFL teachers an estimated 3 to 5 hours per week and augments rather than replaces human teachers.<sup>4</sup>

The commercial stakes are significant. Analyst forecasts place the AI-in-education market at roughly \$2 to 8 billion today, growing to between \$6 and 57 billion by 2030-33 depending on scope,<sup>5,6</sup> while the global English language training market is expected to grow from about \$89 billion in 2025 to \$123 billion by 2030.<sup>7</sup> The biggest risk the sector faces is not job losses but a training gap: only 20% of English language teachers feel sufficiently trained to use AI in their teaching.<sup>2</sup>

**60%**

of US teachers used AI in the 2024-25 school year (Gallup)

**5.9 hrs**

saved per week by teachers who use AI weekly (Gallup)

**20%**

of English teachers feel sufficiently trained on AI (British Council)

**2M+**

TEFL positions opening globally each year (State of TEFL 2026)

**51%**

sceptical AI can teach English without a human by 2035 (British Council)

## What this report covers

- The market: how much money is moving into AI-powered English learning
- Adoption: what teachers, schools and governments are actually doing
- Technology: AI tutors, lesson planning, speech feedback and automated assessment
- Careers: what AI means for TEFL jobs, salaries and skills
- Risks: hallucination, academic integrity, privacy, equity and the training gap
- Five evidence-based predictions for the decade ahead

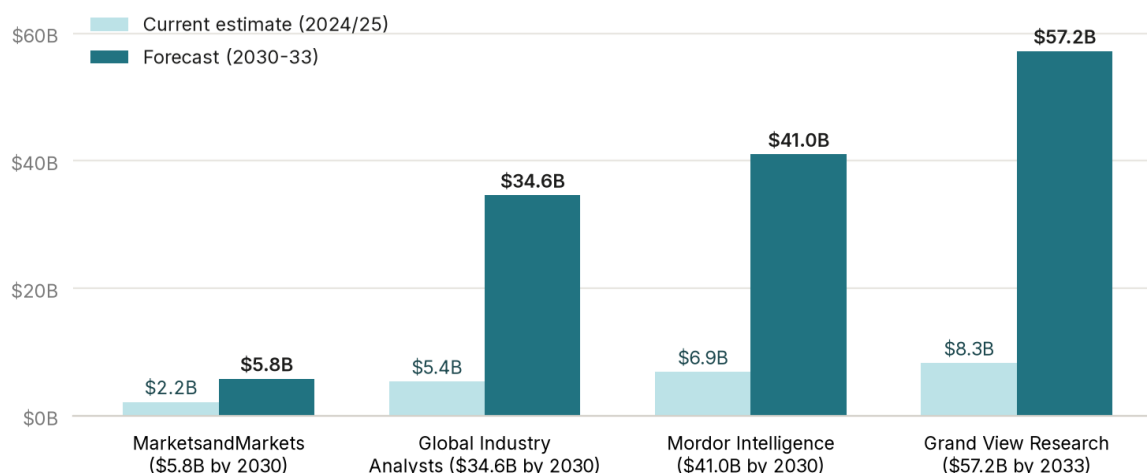
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## SECTION 1

## The market: follow the money

Analyst houses disagree on the exact size of the AI-in-education market because they define it differently, but they agree emphatically on direction. Estimates for the current market range from \$2.2 billion to \$8.3 billion, with forecasts of \$5.8 billion to \$57.2 billion by 2030-33 and compound annual growth rates of 17.5% to 42.8%.<sup>8956</sup>



AI-in-education market estimates and forecasts by analyst house, in US\$ billions.<sup>8956</sup>

### English language learning is the prize market

The global English language training market was sized at \$89.2 billion in 2025 and is forecast to reach \$122.7 billion by 2030.<sup>7</sup> The digital slice is growing far faster: digital English language learning is forecast to grow by \$39.5 billion between 2025 and 2029, a 24.5% annual rate that analysts explicitly attribute to AI redefining the market.<sup>10</sup> Language learning apps alone are projected to grow from \$5.4 billion in 2024 to \$14.1 billion by 2030.<sup>1112</sup>

### Duolingo: the sector's bellwether

Duolingo posted 2025 revenue of \$1.04 billion, up 39% year on year, with 52.7 million daily active users and 12.2 million paying subscribers.<sup>13</sup> English remains its largest studied language, with 48.6 million learners.<sup>14</sup> Yet its market value fell from a \$21.7 billion peak in 2025 to \$5.7 billion by April 2026, driven by investor anxiety about AI disruption even as usage and revenue grew.<sup>15</sup> The lesson for the ELT sector: AI narratives can move sentiment faster than they move classrooms. EdTech venture investment totalled \$2.6 billion in 2025, with the biggest bets concentrated in AI and workforce training.<sup>16</sup>

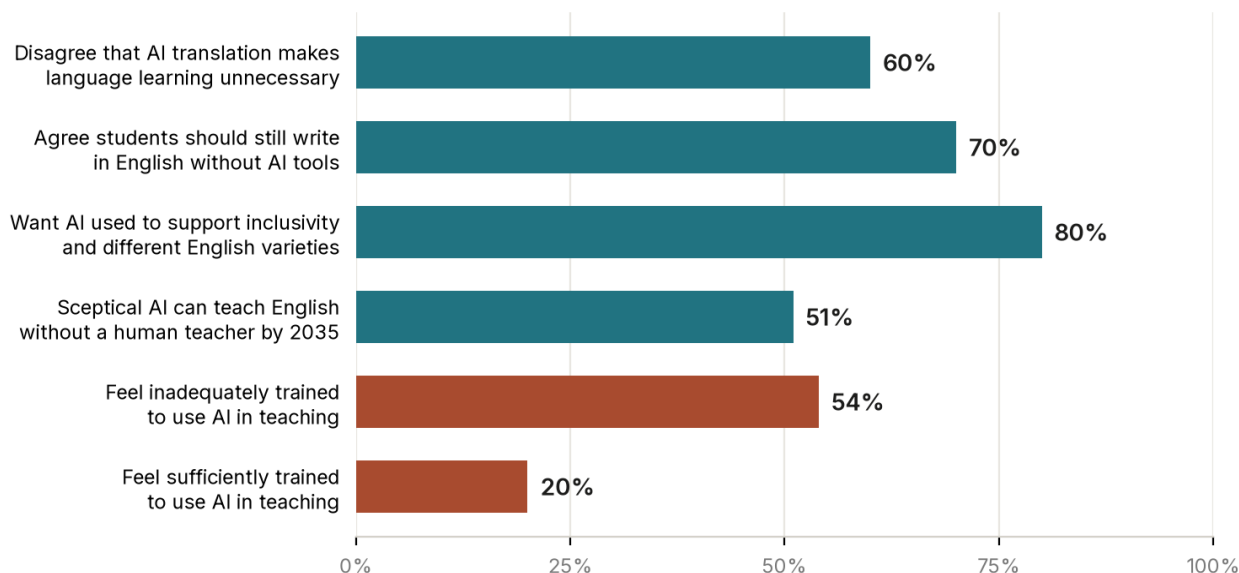
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## SECTION 2

## Adoption: what teachers are actually doing

The single most citable dataset on AI in English language teaching is the British Council's global survey of 1,348 English language teachers across 118 countries. It reveals a profession that is pragmatic about the technology: open to AI as a support tool, confident in the human role, and under-trained for the transition.<sup>2</sup>



British Council global survey of 1,348 English language teachers in 118 countries, 2025. Rust bars highlight the training gap.<sup>2</sup>

### The picture by country and school level

In the US, teacher AI use jumped from 25% in autumn 2023 to 60% in the 2024-25 school year, with 32% using it weekly or more.<sup>171</sup> District-provided AI training doubled in a single year, from 23% to 48%, though wealthier districts train far more of their teachers (67%) than high-poverty districts (39%).<sup>18</sup> Use is strongly stratified by level: 69% of US high school teachers use generative AI against 42% of elementary teachers.<sup>19</sup>

In the UK, 79% of secondary teachers have rethought how they set assignments because of AI, with 59% integrating it constructively and 38% designing deliberately AI-proof tasks.<sup>20</sup> Primary language classrooms remain largely untouched: 75% of England's primary schools never use AI in language teaching.<sup>21</sup> The UK Department for Education found 21% of primary and 25% of secondary schools already offer staff generative AI training, with roughly half planning to introduce it.<sup>22</sup>

The most common teacher use cases are consistent across surveys: preparing to teach and creating materials lead everywhere, followed by differentiation and lesson planning.<sup>232</sup> Across nine measured tasks, 60-84% of US teachers report time savings from AI; only 7% say it slows them down.<sup>23</sup>

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## SECTION 3

## Technology trends: tutors, planning and assessment

### Conversational tutors and speech feedback

AI speech systems now analyse pronunciation accuracy, fluency and speech rate in real time, and research links that instant feedback loop to improved learner motivation and engagement.<sup>24</sup> Comparative analyses conclude that AI tutors can sustain long spoken conversations and correct pronunciation at very low cost, but lack a coherent model of the learner's long-term progress and cannot replicate a human teacher's cultural fluency or accountability, which supports a hybrid model rather than substitution.<sup>25</sup> Researchers describe the emerging pattern as hybrid teaching intelligence: teachers delegate marking and personalisation to AI while retaining judgment, but report clear training gaps.<sup>26</sup>

### Lesson planning and materials adaptation

Purpose-built planning tools have moved this from novelty to workflow. Our own TEFL.ai platform generates CEFR-aligned (A1-C2) lesson plans, worksheets, role-plays and differentiated materials from a single dashboard, alongside exam-support and career tools, and is explicitly positioned as a support tool that will not replace great teachers.<sup>27</sup> The State of TEFL 2026 report finds TEFL teachers already using AI across lesson planning, pronunciation feedback, assessment, adaptive learning and content creation.<sup>4</sup>

### Automated assessment: real, but human-in-the-loop

Cambridge University Press & Assessment has published 12 guiding principles for AI-powered automarking of language tests, explicitly advocating a human-in-the-loop hybrid rather than fully autonomous scoring.<sup>28</sup> The Duolingo English Test is already a fully AI-driven assessment, with human-AI scoring agreement above 0.85 and acceptance by more than 5,500 institutions.<sup>29</sup> ETS has used its e-rater engine to score essays alongside human raters for years.<sup>30</sup> But generic chatbots are not examiners: a 2025 study found ChatGPT consistently assigned higher grades than human raters and failed to reliably distinguish high- from low-proficiency writing.<sup>31</sup> Note that IELTS has not publicly adopted fully automated AI scoring for its core exam; claims to the contrary should be treated with caution.<sup>28</sup>

### From snapshot exams to continuous assessment

UNESCO argues that generative AI forces a rethink of what is worth measuring, pushing assessment toward authentic, process-based evaluation.<sup>32</sup> Analysts note that AI now makes continuous, contextual assessment through portfolios and adaptive tasks a credible alternative to one-off high-stakes tests.<sup>33</sup>

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## SECTION 4

## TEFL careers: demand, salaries and the AI premium

### Demand for English is not going anywhere

The EF English Proficiency Index 2025, based on 2.2 million adult test-takers in 123 countries, finds speaking is the weakest skill in over half of surveyed countries and that youth proficiency is declining rather than rebounding after the pandemic.<sup>34</sup> Major TEFL destination markets including Japan, Mexico, Saudi Arabia and Thailand sit in the lowest proficiency band and declined year on year, which sustains demand for qualified English teachers.<sup>34</sup> UNESCO estimates the world needs more than 40 million additional teachers by 2030,<sup>35</sup> and the OECD calls teacher shortages an urgent and growing challenge across member countries.<sup>36</sup>

### The scale of the TEFL opportunity

Our State of TEFL 2026 research sizes the global ELT market at roughly \$95 billion in 2026, growing to \$181 billion by 2034, with more than 2 billion English learners worldwide, 12 million English teachers, and over 2 million TEFL positions opening globally each year. Regional demand is growing fastest in Asia-Pacific (5.8-8% CAGR) and the Middle East and Africa (7-9% CAGR).<sup>4</sup>

### What AI does to teaching work

PwC's 2025 Global AI Jobs Barometer, built on roughly one billion job advertisements, found that jobs grew even in the most automatable roles (+38% from 2019 to 2024), while AI-skilled workers commanded a 56% wage premium in 2024, up from 25% a year earlier.<sup>37</sup> Degree requirements are declining fastest in AI-exposed postings, suggesting employers increasingly value demonstrated AI fluency over credentials, which plays to the strengths of practical TEFL certification.<sup>37</sup>

Inside the classroom, the time dividend is the headline: 3 to 5 hours saved per week according to our own sector data,<sup>4</sup> and 5.9 hours for weekly users in Gallup's US survey.<sup>1</sup> That matters because teaching is a profession under strain: 77% of teachers report frequent stress, 88% find the job overwhelming at times, and 93% report inadequate institutional support, even though 83% feel a strong sense of purpose.<sup>4</sup> Framed properly, AI adoption in TEFL is as much a wellbeing intervention as an efficiency play. One industry report claims 7 in 10 new English teachers now co-teach with AI; we flag this as an emerging, anecdotal claim rather than a rigorously sampled statistic.<sup>38</sup>

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## SECTION 5

## Risks and challenges: what could go wrong

### Hallucination and accuracy

Generative AI produces plausible but sometimes false content, and researchers note teachers often lack formal training to reliably detect hallucinations in AI-generated learning materials. Verification habits, not blind trust, are the core new skill.<sup>39</sup>

### Academic integrity and unreliable detection

AI detectors are not a safe foundation for high-stakes decisions. GPTZero carries an estimated 16% false-positive rate on human-written text,<sup>40</sup> and a Stanford-linked study found common detectors falsely flagged over 61% of TOEFL essays written by non-native English speakers as AI-generated, a severe equity risk for exactly the learners TEFL serves (reported via a secondary source).<sup>41</sup> AI-assisted human review can raise detection accuracy of machine-translated text from about 52% to about 75%, but the deeper answer is assessment redesign, not detection arms races.<sup>42</sup>

### Data privacy, especially for minors

A UN Special Rapporteur report highlights risks from EdTech data collection, web-scraping and surveillance of children's data,<sup>43</sup> and a child-rights audit of generative AI EdTech tools found widespread opaque data practices and commercial exploitation of children's data.<sup>44</sup> UNESCO recommends a minimum age of 13 for independent generative AI use in education.<sup>45</sup>

### Equity and the digital divide

AI education tools are predominantly built for English and other major languages, structurally disadvantaging multilingual learners,<sup>46</sup> and the OECD flags access and bias risks.<sup>47</sup> The counter-evidence is encouraging: when culturally adapted, adaptive learning platforms show effect sizes of  $d=0.40$  to  $0.85$  for reducing educational inequities. Design choices decide whether AI narrows or widens gaps.<sup>48</sup>

### The teacher training gap: the sector's biggest exposure

Only 20% of English language teachers feel sufficiently trained to use AI, while 54% feel inadequately trained.<sup>2</sup> Training access is unequal by district wealth,<sup>18</sup> and UNESCO has urged governments to regulate generative AI in schools precisely because rollout is outpacing teacher readiness.<sup>49</sup> For TEFL training providers, closing this gap is both a duty and the clearest commercial opportunity of the decade.

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## SECTION 6

## What the institutions say

### UNESCO: govern first, adopt deliberately

UNESCO published the first global policy guidance on generative AI in education in 2023, identifying eight controversies from digital poverty and regulatory lag to model opacity and deepfakes, and recommending a minimum age of 13 for independent use.<sup>45</sup> Its 2024 AI Competency Frameworks for teachers and students define progressive skill levels to guide training and curriculum design,<sup>50</sup> and its assessment think-piece reframes the integrity debate around what is worth measuring in an AI age.<sup>32</sup>

### British Council: English keeps its crown, teachers stay central

The Future of English: Global Perspectives programme, built on roundtables with 92 policymakers and experts from 49 countries, concluded that English will retain its position as the world's most widely spoken language over the next decade and found a strong connection between the desire to learn English and the need for teachers, even when new technologies are considered. It also warns that technology risks widening the divide between those with and without access.<sup>3</sup> Its 118-country teacher survey supplies the adoption and attitude data used throughout this report.<sup>2</sup>

### Cambridge: human-in-the-loop as doctrine

Cambridge University Press & Assessment's 12 guiding principles for AI-powered automarking are the clearest institutional statement from a major English-testing body: AI increases marking speed and consistency, but humans must remain in the loop for high-stakes judgement.<sup>28</sup>

### ETS: automation is already mainstream

ETS's e-rater engine has applied AI and NLP techniques to essay scoring for years, evaluating grammar, mechanics, style and organisation alongside human raters, proof that automated scoring is already embedded in mainstream high-stakes English testing rather than a speculative future.<sup>30</sup>

The convergence across all four institutions is striking: none predicts teacher replacement, all prioritise teacher training and governance, and all treat AI as infrastructure to be shaped rather than a wave to be survived.

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## SECTION 7

## Five predictions for the decade ahead

### 1. AI becomes a standard co-teacher, not a replacement

The weight of evidence, from our own sector data (3-5 hours saved weekly, augmentation framing)<sup>4</sup> to Gallup's AI dividend<sup>1</sup> and PwC's finding that jobs grew even in highly automatable roles,<sup>37</sup> points one way: by the late 2020s, using AI as a planning, assessment and practice co-pilot will be standard professional practice in TEFL rather than a differentiator.

### 2. The teacher's role shifts to facilitator, coach and judgment layer

Teachers are already delegating marking and personalisation to AI while retaining judgment-based work.<sup>26</sup> The core value of a TEFL-certified teacher shifts toward structuring practice, culturally nuanced feedback and motivational accountability, precisely the tasks AI handles poorly.<sup>25</sup>

### 3. Assessment moves from one-off exams to continuous, AI-assisted, human-reviewed models

Cambridge's human-in-the-loop principles,<sup>28</sup> the Duolingo English Test's validated AI-driven model<sup>29</sup> and UNESCO's what-is-worth-measuring agenda<sup>32</sup> all point toward continuous, portfolio-style assessment displacing snapshot testing over the decade.

### 4. AI fluency becomes a measurable salary premium for TEFL teachers

AI-skilled workers already command a 56% cross-industry wage premium, and degree requirements are falling fastest in AI-exposed roles.<sup>37</sup> With only 20% of English teachers feeling adequately trained,<sup>2</sup> scarcity should hand AI-literate TEFL teachers a hiring and pay advantage. We flag this one as inferential: TEFL-specific wage data does not yet exist.

### 5. Real-time translation will not reduce demand for English learning, and may increase it

Meaning lives in tone, register and trust, not just literal words, and commentators consistently find translation earbuds cannot substitute for genuine language ability.<sup>51,52</sup> Sixty per cent of teachers agree translation will not make learning unnecessary,<sup>2</sup> and English learning demand keeps growing on every market forecast in Section 1.<sup>7</sup>

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## Conclusion: teach with the machines

Every serious dataset in this report tells the same story from a different angle. Money is flowing into AI-powered English learning at venture and enterprise scale. Teachers are adopting AI faster than their institutions can train them. The technology is genuinely good at the repetitive layer of teaching work, planning, materials, drilling and first-pass marking, and genuinely poor at the human layer: cultural nuance, motivation, accountability and judgement.

For anyone considering a TEFL career, the rational response to AI is not hesitation but acceleration. Demand for English remains enormous, with over 2 billion learners and 2 million positions opening each year, and the teachers who thrive will be those who treat AI as part of their professional toolkit from day one.<sup>4</sup> For schools and training providers, the mandate is equally clear: close the training gap before it becomes the sector's defining inequality.<sup>2</sup>

### About The TEFL Institute Group

The TEFL Institute Group operates The TEFL Institute of Ireland ([teflinstitute.com](https://teflinstitute.com)), [TEFL.ie](https://tefl.ie), Premier TEFL ([premiertefl.com](https://premiertefl.com)) and [TEFL.ai](https://tefl.ai), delivering accredited TEFL and TESOL certification, teach-abroad programmes and AI-powered teaching tools to a global community of English language teachers. [TEFL.ai](https://tefl.ai) provides free AI tools for teachers, including a lesson plan generator, materials adaptor, IELTS band estimators and career tools, built on the principle that AI should support great teachers, not replace them.<sup>27</sup>

### Method and source notes

This report synthesises published research from UNESCO, the British Council, Cambridge University Press & Assessment, ETS, the OECD, RAND, Gallup, PwC, EF Education First and leading market analysts, alongside The TEFL Institute Group's own State of TEFL 2026 industry research. Market forecasts are presented as ranges because analyst definitions differ. Two claims are flagged in the text as lower-confidence secondary reporting: the 7-in-10 co-teaching figure and the Stanford detector study as reported via a secondary outlet. IELTS has not publicly confirmed fully automated AI scoring for its core exam, and this report makes no such claim. All sources are listed with full links at the foot of the page on which they are cited.

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