



2020

**ICF GLOBAL
COACHING**

S T U D Y

FINAL REPORT

PREFACE

The *2020 ICF Global Coaching Study*, commissioned by the International Coaching Federation (ICF) and conducted by PwC Research, reflects a massive global research effort. With 22,457 survey respondents from 161 countries and territories, this is the largest study of the coaching industry to date.

ICF and PwC invited coach practitioners and managers and leaders who use coaching skill to participate in this important industry research effort during a seven-month period that opened in May 2019 and ended December 2, 2019.

On December 31, 2019 – just four weeks after the survey closed – the World Health Organization (WHO) began to pick up media reports about a cluster of viral pneumonia cases in China’s Wuhan province. Less than three months later, WHO had declared the COVID-19 outbreak a global pandemic as countries and territories worldwide moved into various phases of lockdown to slow the virus’ transmission.

The world we live and work in today is dramatically different from the world we lived in during the second half of 2019. It will be months or years before we can fully appreciate the impact of the ongoing COVID-19 impact on coaches, managers/leaders who use coaching skills, and the individuals and organizations who partner with coaches. The *2020 Global Coaching Study* has enormous relevance as a benchmark: It is the last and best possible snapshot of the coaching industry, pre-pandemic. However, it is no longer a current snapshot. It is a picture of *what was*.

To better understand *what is*, in June 2020 ICF and PwC launched *COVID-19 and the Coaching Industry*, a snapshot survey designed to assess the impact of the pandemic on the coaching industry worldwide. Despite a relatively brief field period (less than one month), the survey yielded more than 10,000 responses from 140 countries and territories. We have published key findings from this research in a separate report, available free to ICF Members and non-members at coachfederation.org/2020study.

As you review the findings published here, we invite you to contextualize the data as pre-COVID, historical benchmarks. Afterwards, you may consider downloading *COVID-19 and the Coaching Industry* to gain a more up-to-date understanding of how the first months of the global pandemic impacted coaches, clients and the way they work together.

2020 ICF GLOBAL COACHING STUDY

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NOTE: The figures presented in this report are based on survey responses and therefore rely on the accuracy of the data provided by the survey respondents.

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Section 1: Introduction

INTRODUCTION

This report presents the findings from the *2020 ICF Global Coaching Study*. The study was commissioned by the International Coaching Federation (ICF).

Founded in 1995, ICF is dedicated to advancing the coaching profession by setting high ethical standards, providing independent certification and building a worldwide network of credentialed coaches. ICF is a global organization, with a membership comprising more than 35,000 trained personal and business coaches located in over 140 countries and territories.

ICF defines coaching as partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.

In late 2006, the ICF commissioned its first-ever global industry study in order to provide a baseline picture of the profession, to identify what coach practitioners saw as the major challenges they face and to estimate the size of the profession. The *2007 ICF Global Coaching Study* was based on responses from 5,415 coaches in 73 countries and territories. Among them were more than 1,500 non-ICF member coaches.

In mid-2011, ICF launched its second global industry study. The updated study attracted 12,133 valid returns from 117 countries and territories, including almost 4,400 valid responses from non-ICF members. The results were published in the *2012 ICF Global Coaching Study*.

The *2016 ICF Global Coaching Study* saw a further step up in global reach and engagement, with 15,380 responses from 137 countries and territories. In addition to updating the 2012 study, the 2016 study also sought to investigate a modality that's gained increasing interest in recent years. As a growing number of individuals and organizations have adopted coaching, the use of coaching skills and approaches has expanded beyond professionally trained coach practitioners to include managers, leaders, and human resources and talent development professionals who apply these competencies in their daily workplace interactions. For that reason, the scope of the 2016 study was widened to include managers and leaders who use coaching skills in the workplace.

The wider, more inclusive scope of the 2016 study was a significant innovation which has been carried through to the 2020 study to provide a fuller picture of the growth of coaching worldwide.

Like its predecessors, the 2020 study was designed to engage as many coach practitioners as possible in order to provide an up-to-date picture of the coaching profession and empower professional coach practitioners to meet the challenges that lie ahead. The fieldwork for the 2020 study commenced in May 2019 and ran through to December 2019. Reflecting the continuing growth of coaching, the survey attracted 22,457 responses from 161 countries and territories.

The next part of this introductory section provides a summary of the research objectives, methodology and survey outcomes. A more detailed description is provided in the Technical Appendix at the end of this report. This section concludes with an outline of the structure of the report.

Objectives

The objectives of the *2020 ICF Global Coaching Study* were as follows:

- To obtain profiling information of professional coach practitioners (e.g. gender, age, level of education, coach-specific training, membership in coaching organizations and certification)
- To obtain similar indicative profiling information of managers and leaders who use coaching skills
- To gain an understanding of the main types of coaching specialties currently being undertaken by coach practitioners, including the types of clients receiving coaching
- To determine estimates of coaching fees and revenue by type of coaching, geographic region and global total
- To identify industry trends and assess attitudes toward a range of challenges and opportunities facing the coaching profession

Definitions

Similar to the 2016 study, survey respondents were first asked if they self-identified as a professional coach. All survey respondents were then asked a follow-up question, to distinguish those who consider themselves primarily as coach practitioners or managers/leaders who use coaching skills. Respondents were asked to select one of six designations to best describe what they primarily do:

- External coach practitioner
- Internal coach practitioner
- Both an external coach practitioner and an internal coach practitioner
- No longer coaching at this time and do not plan to coach in the future
- Human resources/talent development manager/director who uses coaching skills
- Manager/leader who uses coaching skills

The following definitions were provided to respondents:

Coach practitioner – someone who provides an ongoing partnership designed to help clients produce fulfilling results in their personal and professional lives. The coach’s job is to provide support to enhance the skills, resources and creativity that the client already has.

External coach practitioner – a professional coach practitioner, who is either self-employed or partners with other professional coaches, to form a coaching business.

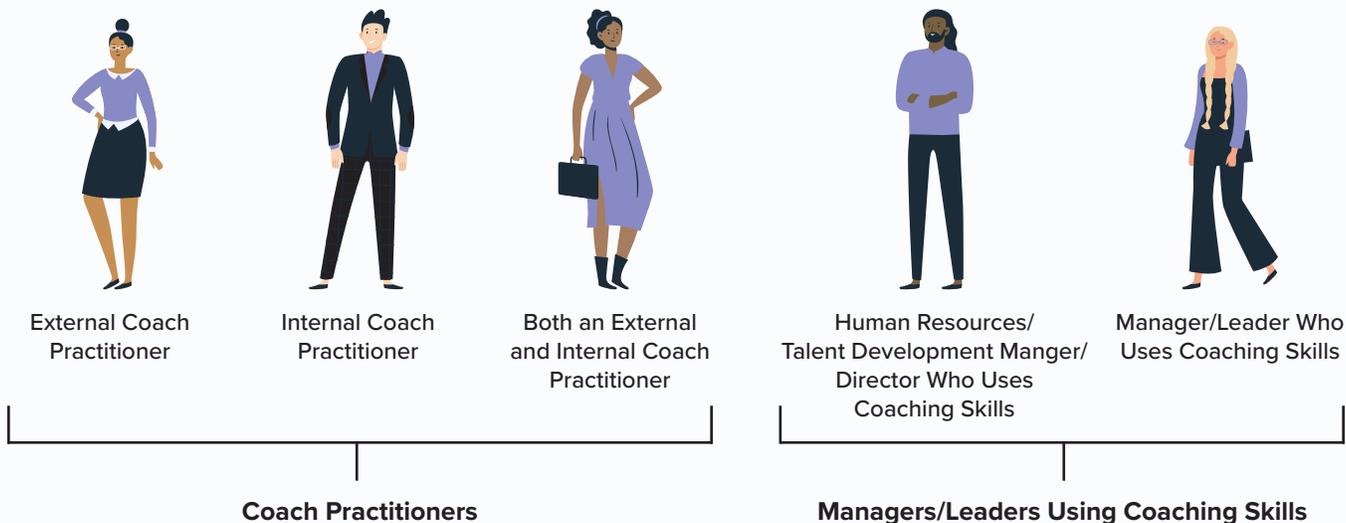
Internal coach practitioner – a professional coach practitioner, who is employed within an organization and has specific coaching responsibilities identified in his or her job description.

Manager/leader using coaching skills – a manager or leader who works with his or her subordinates within the organization to create awareness and support behavior change. This is accomplished using coaching knowledge, approaches and skills.

Respondents who said that none of the above designations describes what they primarily do were considered out of scope and screened out.

The remaining survey respondents were classified into two broad categories: coach practitioners and managers/leaders using coaching skills.

How respondents self-identified



Disclaimer: For the remainder of this report, we will refer to those who self-identified as a manager/leader or human resources/talent development manager/director who uses coaching skills as **managers/leaders using coaching skills**.

The term “coaching continuum” is used in this report to describe the wider range of modalities in which coaching approaches and competencies may be applied. On one side of the continuum are managers and leaders who apply coaching skills and approaches in the workplace. The type and extent of training that these individuals receive may vary dramatically. On the other end are trained, professional coach practitioners, most of whom derive or have derived a portion of their annual income from their work as an internal and/or external coach.

Although it is possible for an individual to exist at multiple points on the coaching continuum (e.g., someone may use coaching skills and approaches in her role as an organization’s director of HR and operate a part-time business as an external coach practitioner), for the purposes of this study respondents were classified according to the modality they said fit them best.

Structure of the Questionnaire

The questionnaire for the 2020 ICF Global Coaching Study consisted of four main sections:

- **The coach.** All respondents were asked to provide information relating to their location, age, education, coach-specific training, membership in coaching organizations and coaching credentials. Coach practitioners were also asked to give their main coaching specialty and whether they provide services in addition to coaching. For the 2020 study, those saying they offer additional services were also asked to give their allocation of time between coaching and other services they offer
- **The client.** This second set of questions sought information from coach practitioner respondents regarding the people to whom they provide coaching services
- **The size of the profession.** This section asked coach practitioners with active clients about their current annual revenue/income from coaching; fees per one-hour session; and past/future trends in clients, fees, sessions and revenue/income
- **Key issues facing the industry.** The final section sought the views of all respondents on a range of issues that will affect the future direction of the profession.

The questionnaire used for the 2020 study is similar to the instruments employed for the 2016 ICF Global Coaching Study and 2012 ICF Global Coaching Study, facilitating comparisons across a range of topics.

All respondents who were screened in for the purposes of the survey were asked to provide information about themselves, **the coach** (e.g., location, age, receipt of coach-specific training).

Questions about **the client** were posed only to respondents saying that *coach practitioner* best describes what they primarily do. Similarly, questions about annual revenue/income and hourly fees (**size of the profession**) were posed only to coach practitioners.

Finally, all respondents were asked to give their views on the suite of questions around **key issues facing the industry**.

Methodology

The updated global survey was launched online in May 2019. Several approaches were deployed to reach out and engage worldwide with coach practitioners and managers/leaders using coaching skills.

First, ICF’s extensive list of contacts was used to circulate personalized invitations and survey links. In addition to current ICF members, invitations to participate in the survey were sent to non-members holding ICF credentials, expired ICF members and business leads obtained through ICF’s strategic alliances with business and professional organizations, including the Association for Talent Development (ATD), Human Capital Institute (HCI) and Society for Human Resource Management (SHRM). PwC also sent invitations and survey links to individuals who had participated in previous iterations of the study and expressed their willingness to participate again in the future.

Second, ICF members were asked to share a generic link to the online survey registration site with their professional networks, with the intention of initiating a "snowball" effect that would attract even more non-ICF coaches and managers/leaders using coaching skills.

Third, leaders of ICF chapters around the world were identified as *Global Coaching Survey Champions* and encouraged to promote the survey in their communities through an email and social media campaign initiated by ICF Headquarters.

Fourth, the survey was implemented to ensure that it was readily accessible to all potential respondents. Thus, the survey was made available online in nine languages. Also, the survey was designed so that it could be completed using a range of mobile devices.

In addition, over the six-month survey fieldwork period, concluding in December 2019, global reminders were issued on a regular basis to those on the ICF contacts database who had yet to complete the survey. Coaches who became ICF members after the initial launch were also invited to participate through the monthly global reminder campaign.

Throughout 2019, ICF also promoted the survey extensively with coaches who attended local, regional and global ICF events.

Finally, several other professional coaching bodies also offered to deliver messages directly to their own members inviting them to participate in the study. Our deepest gratitude must be offered to the following collaborating organizations:

- Association for Coaching (AC)
- Association of Coach Training Organizations (ACTO)
- European Mentoring and Coaching Council (EMCC)
- Graduate School Alliance for Executive Coaching (GSAEC)
- International Association of Coaching (IAC)
- World Business and Executive Coach Summit (WBECS)

Survey Outcomes

Efforts to maximize participation in the 2020 study proved very successful. With a total of 22,457 valid responses from 161 countries and territories, the study is large in scale and global in reach.

More than 100 survey returns were received from 52 countries and territories across all major world regions, up from 40 in the 2016 study. The total number of survey returns represented a 46% uplift on the 2016 study, which attracted 15,380 responses.

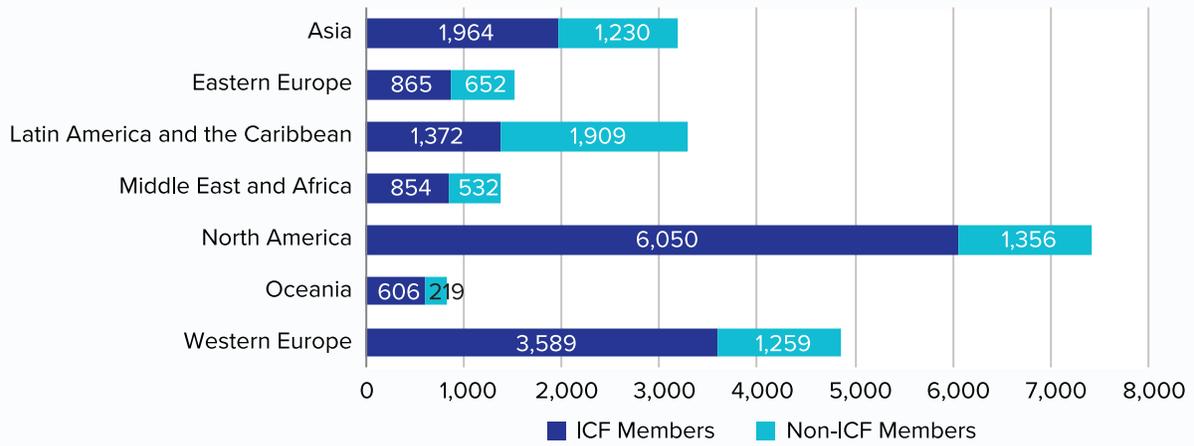
Those comparisons point to the growth and spread of coaching between the 2016 and 2020 studies, especially in the emerging regions. The number of responses from Latin America and the Caribbean almost doubled, rising from 1,172 in 2016 to 3,281 in 2020. Asia generated 3,194 responses, an increase of 88% on the 2016 out-turn. Almost 1,400 responses came from the Middle East and Africa, a 71% increase on 2016.

The response from non-ICF members further testifies to the success of the efforts made to reach and engage the coaching world. In total, 7,157 valid responses were received from non-ICF members, representing 32% of the total number of completed surveys. The number of non-ICF members responding from Latin America and the Caribbean more than doubled, from 803 in 2016 to 1,909 in 2020 (+138%).

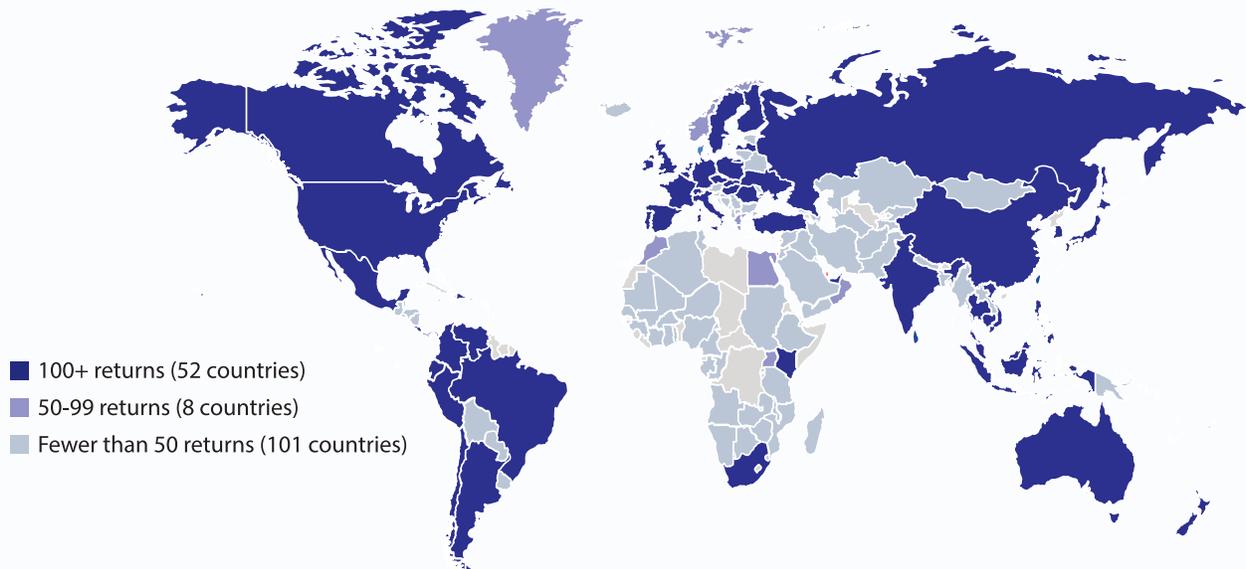
ICF members responded to the survey in record numbers, 15,300 in total, a 61% increase on the numbers participating in 2016. The highest percentage increase came from Asia, up by 88% to 1,964. The number of ICF members responding from the Middle East and Africa rose to 854 in 2020, up from 488 in 2016 (+75%).

Reflecting the region's 48% share of total ICF membership, the largest number of ICF member responses was from North America (6,050). Almost 3,600 responses were received from ICF members in Western Europe.

Survey responses by region and ICF membership



The global reach of the 2020 ICF Global Coaching Study

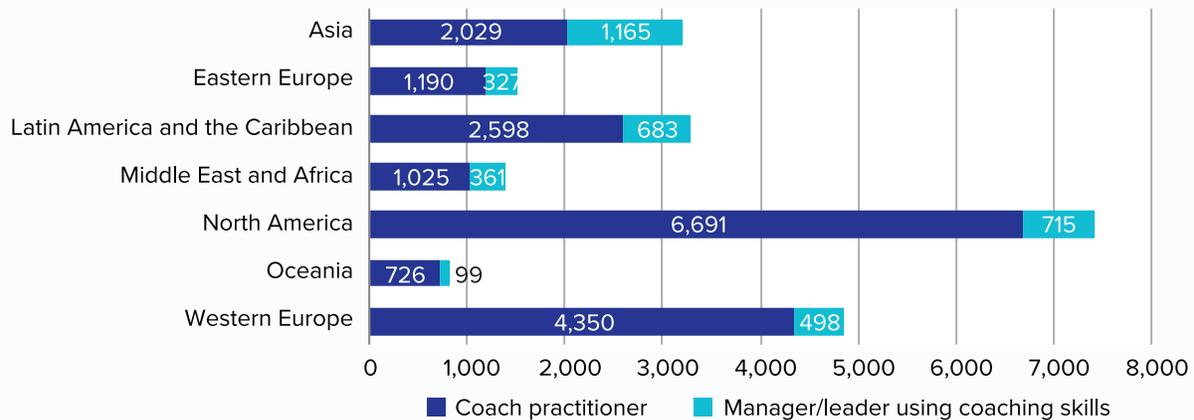


Geographical spread of survey returns for the 2020 ICF Global Coaching Study

| Survey returns | 2020 Countries and Territories | 2016 Countries and Territories | 2012 Countries and Territories |
|----------------|--------------------------------|--------------------------------|--------------------------------|
| 100+ | 52 | 40 | 31 |
| 50-99 | 8 | 8 | 7 |
| Fewer than 50 | 101 | 89 | 79 |
| Total | 161 | 137 | 117 |

Of the 22,457 total responses, 18,609 (83%) were provided by coach practitioners. Respondents who self-identified as managers/leaders who use coaching skills accounted for 3,849 returns (17%). The percentage split between coach practitioners and managers/leaders using coaching skills was similar to the 2016 study (84% coach practitioners and 16% managers/leaders).

Survey responses by region and how respondents self-identified



Almost all of the 18,609 respondents self-identifying as coach practitioners also said they consider themselves to be professional coaches (97%). Those who said they are managers/leaders using coaching skills were about equally split between those who self-identified as professional coaches (53% and those who did not (47%).

Overall, a total of 2,286 responses were provided by respondents who did not consider themselves to be professional coaches, but who went on to self-identify as either a coach practitioner (484 responses) or a manager/leader who uses coaching skills (1,802 responses).

Respondents describing themselves as professional coaches, by self-identification

| | Professional coach: | | All |
|--|---------------------|--------------|---------------|
| | Yes | No | |
| Coach Practitioners | 18,125 | 484 | 18,609 |
| Managers/leaders using coaching skills | 2,046 | 1,802 | 3,848 |
| All | 20,171 | 2,286 | 22,457 |
| | % | % | % |
| Coach Practitioners | 97 | 3 | 100 |
| Managers/leaders using coaching skills | 53 | 47 | 100 |
| All | 90 | 10 | 100 |

In reporting on the survey findings, the main distinction drawn in this report is between coach practitioners and managers/leaders using coaching skills. In particular, the size and scale of the profession is measured by income and fees generated by active coach practitioners. The findings are reported in Section 2.

Within that context, it is useful to observe that, while they may not generate income and fees via the "traditional" route of coaching engagements, the managers/leaders using coaching skills who responded to this survey show a high degree of participation in the coaching profession.

For example, 93% of managers/leaders using coaching skills have received some coach-specific training. Almost one in two such respondents (48%) hold membership in a professional organization while 45% had achieved coaching certification or credentials. Section 5 of this report presents a detailed profile of managers/leaders using coaching skills.

Training, certification/credentials and memberships: Summary Indicators

| | Coach practitioners | Managers/leaders using coaching skills |
|---|---------------------|--|
| | % | % |
| Coach-specific training | | |
| None | 1 | 7 |
| 1-30 hours | 1 | 10 |
| 31-59 hours | 4 | 10 |
| 60 plus hours | 94 | 73 |
| Coaching certification/credentials | 74 | 45 |
| Membership in professional organization | 82 | 48 |



93% of managers/leaders using coaching skills have received some coach-specific training.

Structure of the report

The remainder of this report is structured as follows:

Section 2 The Size and Scope of the Profession. This section presents estimates for the number of coaches by world region, distinguishing between coach practitioners and managers/leaders using coaching skills. The estimates for the numbers of coach practitioners are combined with the survey results for average annual revenue/income from coaching to produce an estimate for global coaching revenue. The section also discusses the survey results for average fees per one-hour coaching session, hours working as a coach practitioner and current number of active clients. The section concludes by looking at current and future trends in the key business indicators.

Section 3 Summary Business Indicators. This section examines linkages between the key business indicators (annual revenue/income, hourly fee rates, hours working as a coach and number of active clients) and attributes of the coach practitioner (e.g., years' experience, main area of coaching), as well as the nature of the engagement with the client (e.g., position of the client served, length of coaching engagement).

Section 4 The Coach Practitioner. This section presents a profile of coach practitioners, under four headings: demographics (generation, gender, education, coaching experience, main areas of coaching and services offered in addition to coaching); training and credentialing (client expectations, receipt of coach-specific training and hours completed, membership of professional organizations and certifications/credentials held from professional organizations); the client (position held by majority of clients, the split between primary and secondary clients, length of coaching engagements, duration of coaching sessions, the male/female split, age and main method of contact with the client); and, key issues and future trends (coach practitioners' views on whether coaching should be regulated, building a coaching culture and obstacles and opportunities over the next 12 months).

Section 5 Managers/Leaders using Coaching Skills. This section presents a profile of managers/leaders using coaching skills, including: demographics (generation, gender and level of education); training and credentialing (receipt of coach-specific training and hours completed, plans for the next 12 months, membership of professional organizations and certifications/credentials held from professional organizations); and, key issues and future trends (respondents' views on whether coaching should be regulated, building a coaching culture within the organization and obstacles and opportunities over the next 12 months).

Section 6 Data Tables. A selection of tables to enable comparisons across the full coaching continuum, including demographics, training and credentialing and key issues and future trends.

Section 7 Technical Appendix. This section provides further information on the approach to the *2020 ICF Global Coaching Study*, including an explanation of the methodology for estimating the number of coach practitioners worldwide and by region.

NOTE: *The figures presented in this report are based on survey responses and therefore rely on the accuracy of the data provided by the survey respondents.*

NOTE: *Due to rounding in some instances sums may not add to 100%.*



Section 2: Size and Scope of the Profession

INTRODUCTION

A key objective for the 2020 ICF Global Coaching Study was to determine estimates for the size and scope of the coaching profession both globally and by geographic region. This section commences with a presentation and discussion of the estimates for the following key statistics:

- The estimated number of individuals within the coaching continuum
- The number of coach practitioners with active clients
- Revenue/income from coaching

The section then considers the following key drivers of revenue/income from coaching:

- Average number of active clients currently coaching
- Average fee per one hour coaching session
- Average number of hours spent working as a coach

The section concludes with a look at coach practitioners' views regarding their business prospects over the next 12 months, as measured by the expected direction of changes in activity levels, fees and revenue/income from coaching. In that regard, it is important to appreciate that the survey was conducted in 2019 with a look ahead to 2020. Therefore, the survey was undertaken prior to the coronavirus pandemic and the results should be viewed within that context.

The Number of Coaches

There does not currently exist an accepted, globally inclusive list of individuals in the coaching continuum. Consequently, it was necessary to estimate the number of coach practitioners, both globally and by region, using a combination of known total ICF membership numbers combined with estimated membership numbers of other organizations and survey responses, based on a membership ratio method.

The methodology is fully detailed in the Technical Appendix. The estimation procedure benefits considerably from robust ICF membership counts and the large scale of the global survey including non-ICF members. Nonetheless, it should be recognized that the size and scale estimates presented in this section are subject to uncertainty.

Applying the same methodology as in the 2012 and 2016 ICF Global Coaching Studies, it is estimated there are approximately 77,700 professional coach practitioners worldwide, an increase of 36% on the comparable estimate for 2015 (57,100).

The fastest growth rates occurred in the emerging regions, notably Latin America and the Caribbean where the number of professional coach practitioners is estimated to have almost tripled between 2015 and 2019, growing by 185% to 13,200 in 2019. Growth was also robust in Asia (42%) and Eastern Europe (41%).

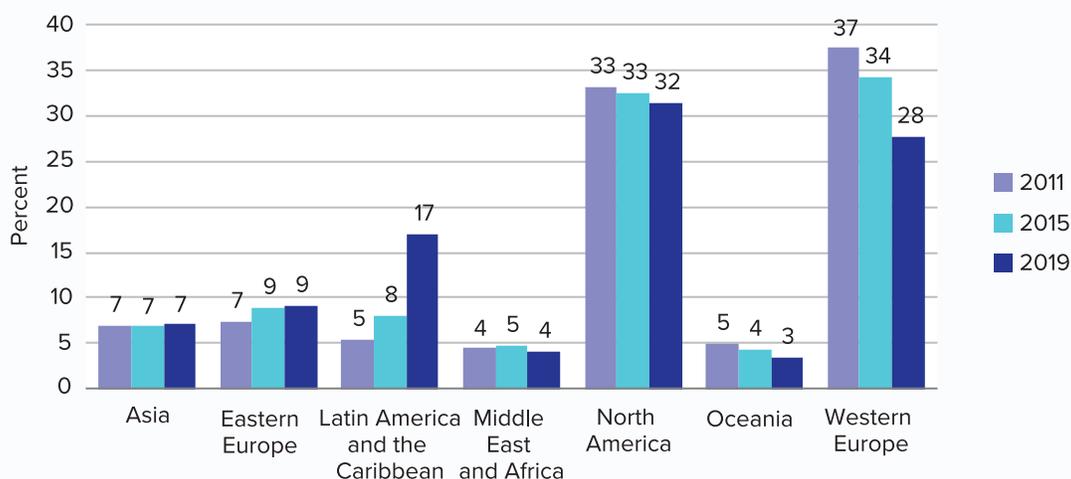
Growth was slower in the more established regions of Western Europe (10%) and Oceania (9%). North America posted relatively strong growth rate of 32%.

Professional coaches: 2019 compared to 2015 and 2011

| | 2011 | 2015 | 2019 | Percent Increase | |
|---------------------------------|---------------|---------------|---------------|------------------|------------|
| | | | | 2011-2015 | 2015-2019 |
| Asia | 3,300 | 3,900 | 5,500 | 16% | 42% |
| Eastern Europe | 3,500 | 5,100 | 7,100 | 44% | 41% |
| Latin America and the Caribbean | 2,600 | 4,600 | 13,200 | 80% | 185% |
| Middle East and Africa | 2,100 | 2,700 | 3,200 | 33% | 16% |
| North America | 15,800 | 18,600 | 24,500 | 18% | 32% |
| Oceania | 2,400 | 2,500 | 2,700 | 3% | 9% |
| Western Europe | 17,800 | 19,600 | 21,500 | 10% | 10% |
| Global | 47,500 | 57,100 | 77,700 | 20% | 36% |

Reflecting the regional differences in growth rates there has been an accompanying shift in the distribution of coach practitioners from the more established to the emerging regions. Since 2011, the global share of coach practitioners has been growing in Latin America and the Caribbean along with Eastern Europe. Over the same period, North America, Oceania and Western Europe have each seen a fall in their shares.

Professional coaches: Percent of global estimate



Drawing on the two-stage approach used for the 2020 study, it is possible to also produce estimates of the numbers of *coach practitioners* by world region. Globally, it is estimated that there are approximately **71,000** coach practitioners. With an estimated 23,300 practitioners, North America accounts for the largest share (33%) followed by Western Europe, with an estimated 29% share (20,400 coach practitioners).

Estimates have also been prepared for the number of *managers/leaders using coaching skills*. Applying the membership ratio methodology to the survey results yields an estimated **15,900** managers/leaders using coaching skills. This estimate should be viewed as strictly indicative and subject to a higher level of uncertainty than the figures for coach practitioners.

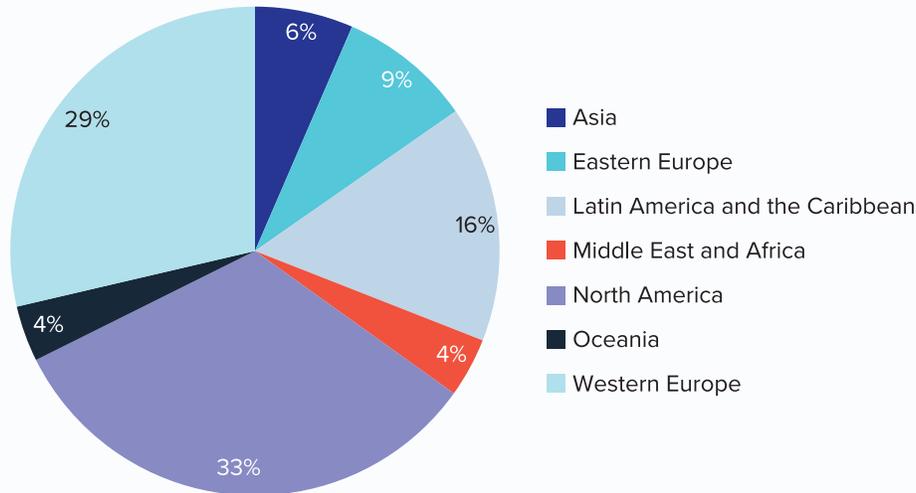
This is primarily because the survey data collection relied primarily on contact lists related to individuals associated with professional coaching organizations, as well as snowballing via coaching networks. Managers/leaders use coaching skills within the workplace or organizational setting. It is therefore plausible that an approach based on coaching-related lists and networks will tend to underestimate the number of managers and leaders who use coaching skills.

Bearing that caveat in mind, it is nonetheless interesting to observe that the estimated distribution by global region of managers/leaders using coaching skills is similar, but not identical, to the distribution of coach practitioners. In particular, Asia accounts for the largest share of respondents identifying as managers/leaders using coaching skills (22%).

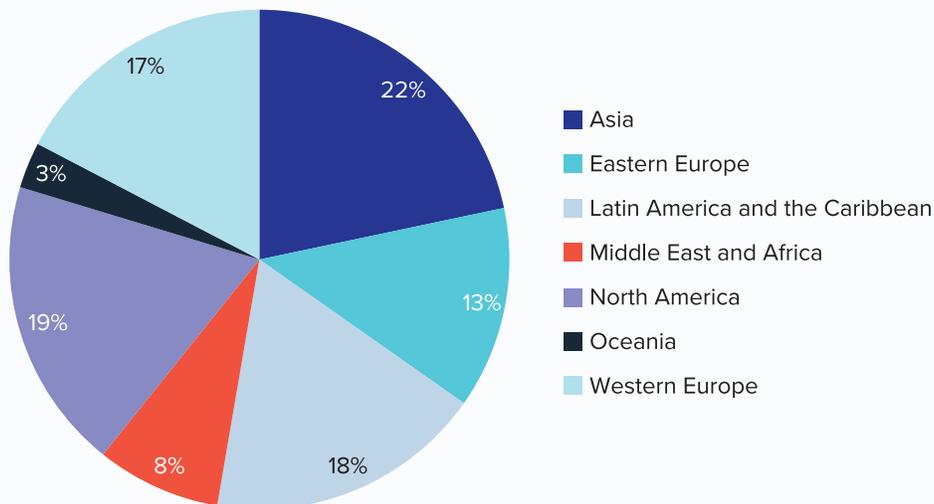
Coach practitioners and managers using coaching skills: Estimates by world region

| | Coach practitioners | Managers/leaders using coaching skills | All |
|----------------------------------|---------------------|--|---------------|
| Asia | 4,600 | 3,400 | 8,100 |
| Eastern Europe | 6,300 | 2,100 | 8,400 |
| Latin American and the Caribbean | 11,000 | 2,900 | 13,900 |
| Middle East and Africa | 2,800 | 1,300 | 4,100 |
| North America | 23,300 | 3,000 | 26,300 |
| Oceania | 2,600 | 500 | 3,100 |
| Western Europe | 20,400 | 2,800 | 23,100 |
| Global | 71,000 | 15,900 | 86,900 |

Coach practitioners: Distribution by world region



Managers/Leaders using coaching skills: Distribution by world region



Between 2015 and 2019, the number of coach practitioners is estimated to have increased by one-third. Growth was especially strong in the emerging regions of Latin America and the Caribbean (+174%) and Eastern Europe (+40%). North America also expanded in line with the global average (+33%). Relative to the global average, growth was more modest in Western Europe (+9%) and Oceania (+11%).

The number of managers/leaders using coaching skills is estimated to have risen by almost half (+46%), albeit with widely disparate rates across the regions. Similar to coach practitioners, Latin America and the Caribbean recorded the fastest growth (+198%). In Asia, the number of managers/leaders using coaching skills more than doubled (+124%).

The combined estimates for coach practitioners and manager/leaders using coaching skills indicate a vigorous 36% expansion worldwide between 2015 and 2019, presenting a very buoyant picture of the evolution of coaching over the period 2015 to 2019.

Coach practitioners and managers using coaching skills: Estimates by world region — Percent change 2015–2019

| | Coach practitioners | Managers/leaders using coaching skills | All |
|----------------------------------|---------------------|--|------------|
| Asia | 26% | 124% | 55% |
| Eastern Europe | 40% | 34% | 38% |
| Latin American and the Caribbean | 174% | 198% | 179% |
| Middle East and Africa | 16% | 86% | 32% |
| North America | 33% | -2% | 28% |
| Oceania | 11% | 26% | 13% |
| Western Europe | 9% | 3% | 8% |
| Global | 33% | 46% | 36% |

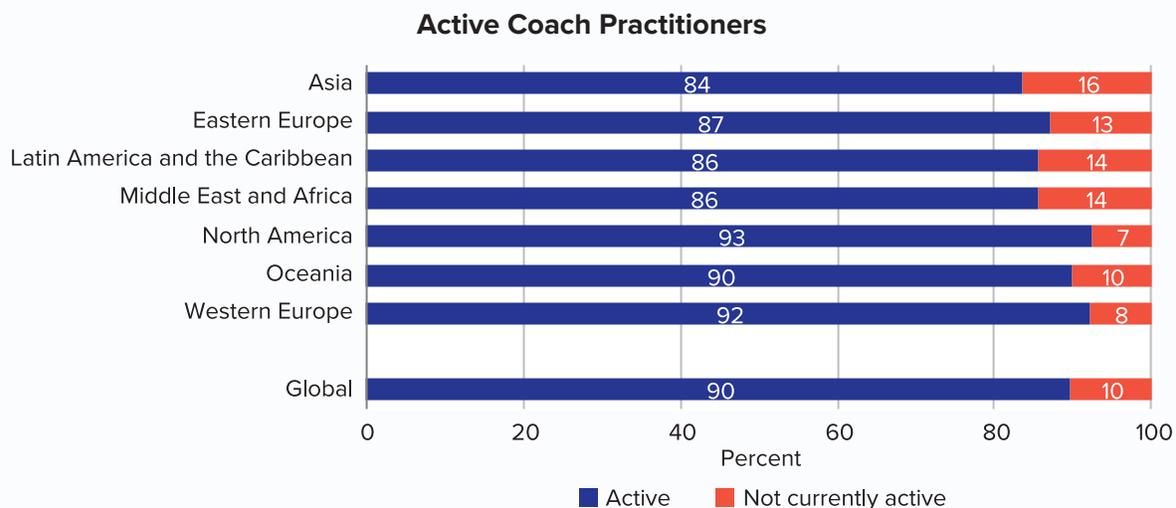
Active Coach Practitioners

Respondents who self-identified as coach practitioners were asked about their current level of coaching activity, specifically, whether they have active clients to whom they are providing coaching services at the time the survey was conducted in 2019. Only active coach practitioners were asked about revenues, fees per one-hour coaching session and numbers of clients.

Nine in 10 coach practitioners (90%) said they currently have active clients.

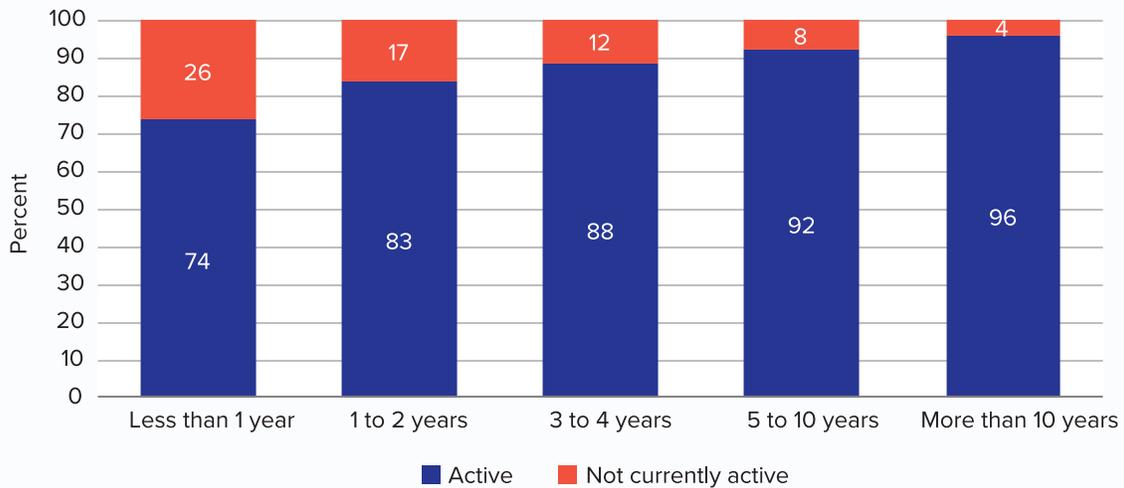
In broad terms, the proportion of coach practitioners with active clients tends to be higher in the more established markets; i.e., North America (93%), Oceania (90%) and Western Europe (91%). In the emerging regions, the proportion ranges from 84% in Asia to 87% in Eastern Europe.

The broad regional pattern is unchanged from the 2015 survey.



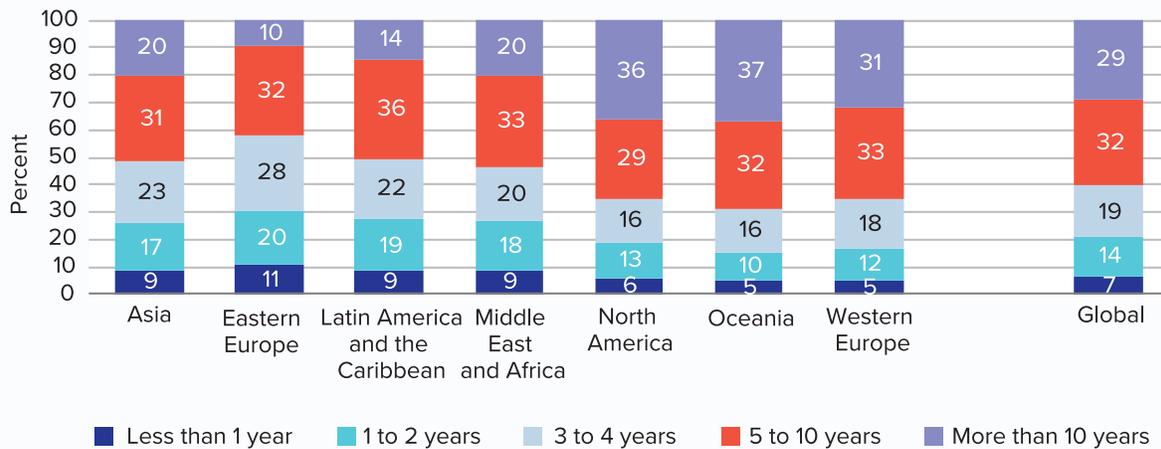
Regional differences in the proportion of respondents with active clients partly reflect regional contrasts in years of coaching experience (see Section 4). That is because the number of years of coaching experience is a strong predictor of the likelihood that the coach has one or more active clients. Thus, the proportion of coach practitioners with active clients rises from 74% among those with less than one year of experience to 96% among coach practitioners with more than 10 years of experience.

Active coach practitioners by years of experience



The share of coach practitioners with 10 or more years of experience is highest in the more established regions, ranging from 31% in Western Europe to 37% in Oceania. By contrast, in the emerging regions, there are proportionately fewer coach practitioners with 10 or more years of experience (ranging from 10% in Eastern Europe to 20% in Asia and the Middle East and Africa).

Active coaches: Years coaching by region



Combining the estimate for the total number of coach practitioners with the proportion saying they have one or more active clients yields an estimated **63,900** coach practitioners with one or more active clients. North America accounts for a little over one in three active coach practitioners (34%) followed by Western Europe (29%).

Active coach practitioners by region

| | Coaches | % of coach practitioners |
|----------------------------------|---------------|--------------------------|
| Asia | 3,900 | 6 |
| Eastern Europe | 5,500 | 9 |
| Latin American and the Caribbean | 9,400 | 15 |
| Middle East and Africa | 2,400 | 4 |
| North America | 21,600 | 34 |
| Oceania | 2,400 | 4 |
| Western Europe | 18,800 | 29 |
| Global | 63,900 | 100 |

Annual Revenue/Income from Coaching

Survey respondents with active clients were asked to give their annual revenue or income generated by **coaching only**. Respondents provided annual revenue data in a variety of different currencies, depending on the country in which they reside. A total of 76 different currencies were used.

In order to provide a common reference point, the revenue figures were converted to U.S. dollars (USD) based on international exchange rates published by the World Bank.

When calculated in U.S. dollars, average revenues are highest in the established markets of North America, Western Europe and Oceania.

Globally and within each world region, there is considerable variation in annual revenues earned from coaching.

Average annual revenue/income from coaching (USD)

| | Average USD |
|----------------------------------|-----------------|
| Asia | \$33,600 |
| Eastern Europe | \$19,100 |
| Latin American and the Caribbean | \$20,900 |
| Middle East and Africa | \$34,900 |
| North America | \$62,500 |
| Oceania | \$61,100 |
| Western Europe | \$51,100 |
| Global | \$47,100 |

Annual revenue/income from coaching: Purchasing Power Parities (international dollars)

The U.S. dollar revenue figures do not take into account the differences between countries in the prices of goods and services. The purchasing power of a dollar revenue figure will be higher where the average price level is lower than in the US, and vice versa.

It is possible to take account of such price differences by adjusting international exchange rates using purchasing power parities (PPPs) to calculate annual revenue in *international U.S. dollars*.

The PPP adjusted revenue is lower than the unadjusted figures in regions such as Western Europe where prices tend to be higher than in the USA. Conversely, the adjusted figure is higher in regions such as Latin America and the Caribbean where prices tend to be lower.

It can be seen that the regional differences on a PPP basis are much less pronounced by comparison with the contrasts on a U.S. dollars basis. For example, the average revenue for Latin America and the Caribbean is 67% of the global average on a PPP basis versus 44% on the U.S. dollar basis.

Indeed, the PPP estimate for the Middle East and Africa is 38% above the global PPP average whereas the region's average revenue on a U.S. dollar basis is 26% below the global average.

While they are interesting to observe, *the PPP adjusted revenue figures should nonetheless be interpreted with considerable caution*. PPPs are difficult to calculate in many countries since they depend on making comparisons with U.S. prices.

Also, PPPs are most appropriate for comparing average levels of per capita welfare, but the basket of goods and services that a coach practitioner may demand in his or her country of residence may vary from the average.

Finally, PPP-adjusted figures are notional amounts whereas U.S. dollar revenues correspond to cash values (albeit subject to currency fluctuations).

Average annual revenue/income from coaching (USD)

| | Average PPP |
|----------------------------------|-----------------|
| Asia | \$66,200 |
| Eastern Europe | \$42,000 |
| Latin American and the Caribbean | \$38,600 |
| Middle East and Africa | \$79,500 |
| North America | \$62,900 |
| Oceania | \$55,600 |
| Western Europe | \$55,400 |
| Global | \$57,600 |

Annual revenue/income from coaching: Percent change

The average revenue/income from coaching estimates for 2019 can be compared with the 2015 figures published in the 2016 *ICF Global Coaching Study*. The comparison in U.S. dollar terms indicates a decline of 8% between 2015 and 2019, ranging from +4% in Eastern Europe to -23% in Latin America and the Caribbean.

By contrast, when calculated in international dollars using PPPs, average annual revenue/income is estimated to have grown by a modest 4%, ranging from 32% in Eastern Europe to -10% in Latin America and the Caribbean.

Revenue/income from coaching: Percent change 2015 to 2019

| | USD | PPP |
|----------------------------------|------------|-----------|
| Asia | -11% | -8% |
| Eastern Europe | 4% | 32% |
| Latin American and the Caribbean | -23% | -10% |
| Middle East and Africa | -3% | 12% |
| North America | 1% | 3% |
| Oceania | -16% | 5% |
| Western Europe | -8% | 14% |
| Global | -8% | 4% |

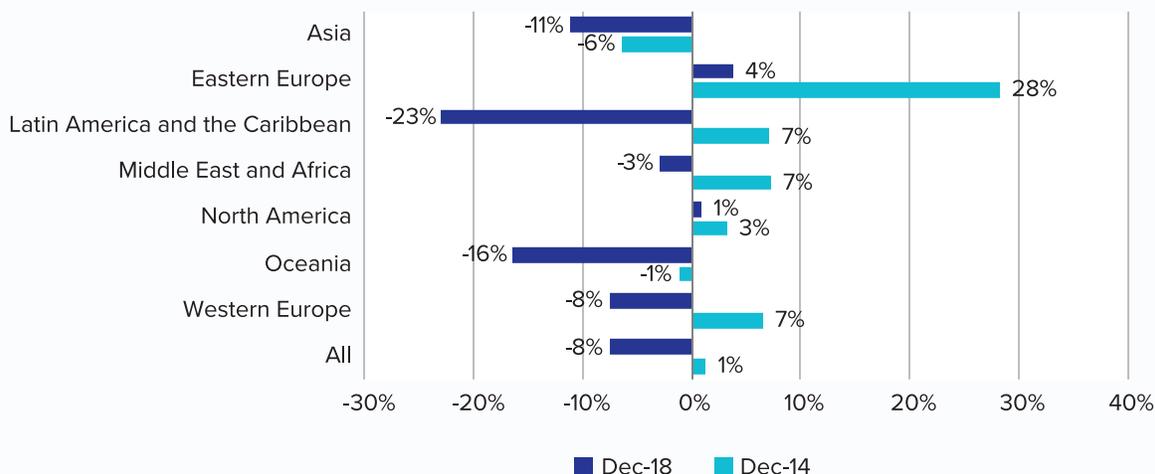
A number of factors should be considered in the interpretation of the percent change estimates for annual revenue/income, particularly the U.S. dollars estimates.

First, and most importantly, the period between 2015 and 2019 saw a further strengthening of the U.S. dollar. The effect of the stronger U.S. dollar is illustrated in the chart below. In particular, if exchange rates had remained unchanged from the December 2014 levels which were used to calculate 2015 average income/revenue, global average revenue/income would have increased by 1%. Thus, for example, if measured at the December 2014 exchange rates average revenue/income in Latin America would have increased by 7%, instead of recording a -23% decline when measured at December 2018 rates.

Other factors to be considered include:

- Coaching has been expanding rapidly over the past four years. Forty percent of active coach practitioners said they had been coaching for four years or less. Less experienced coach practitioners tend to have lower average revenues over that period where they are building their business.
- The revenue/income measures presented in this report are for coaching only, but 93% of coach practitioners also offer additional services such as consulting, counseling, etc. On average, coach practitioners who offer additional services allocate 44% of their time to coaching. The income that coach practitioners generate from those additional services is not included in the figures presented in this section.
- The revenue/income estimates are survey-based and can therefore be expected to fluctuate between surveys.

Average annual revenue/income: Percent change by exchange rate regime



Total Revenue from Coaching

For each of the seven world regions, total revenue from coaching is derived by multiplying the regional number of active coach practitioners (page 19) by average annual revenues from coaching (page 21).

On that basis, the estimated global total revenue from coaching in 2019 was **\$2.849 billion U.S. dollars**, representing a 21% increase over the 2015 estimate. The main factor driving the increase in global revenues was the rise in the number of active coach practitioners.

Latin America and the Caribbean showed the largest increase in total annual revenue, up by an estimated 107%. With average annual revenue/income falling in U.S. dollar terms (-23%), the uplift in annual revenue was entirely due to the rapid pace of expansion in the number of active coach practitioners (+174%).

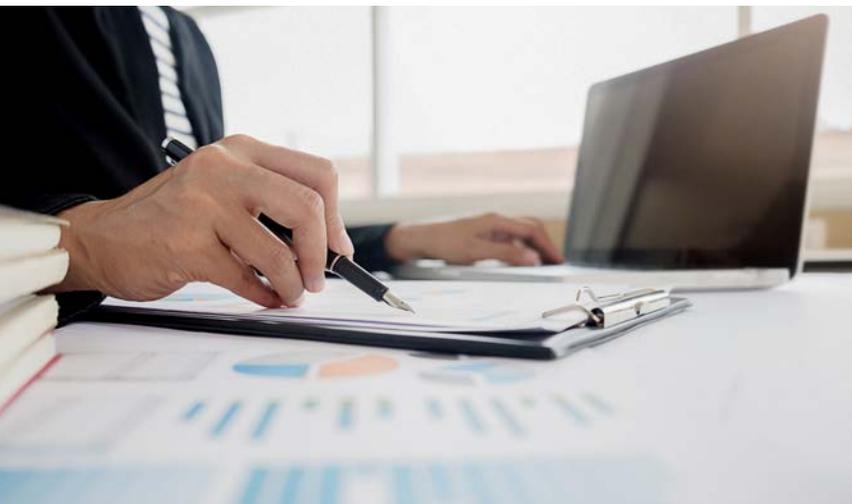
In North America, total revenue is estimated to have exceeded \$1 billion for the first time, rising by 36% to \$1.3 billion.

Revenues are estimated to have fallen only in Oceania (-10%). There, the 9% rise in the number of active coach practitioners was not sufficient to offset an estimated 16% drop in average U.S. dollar revenue/income from coaching.

In overall terms, the share of global revenue from coaching accounted for by the established higher-income regions (North America, Western Europe and Oceania) fell from 85% in 2015 to 82% in 2019. The shift in share was due to the rise in the Latin America and the Caribbean share from 3% in 2015 to 7% in 2019.

Total annual revenue from coaching

| | USD (million) | share of global (%) | % of change 2015-2019 |
|----------------------------------|----------------|---------------------|-----------------------|
| Asia | \$126 | 4.4 | 12% |
| Eastern Europe | \$101 | 3.6 | 45% |
| Latin American and the Caribbean | \$191 | 6.7 | 107% |
| Middle East and Africa | \$80 | 2.8 | 9% |
| North America | \$1,296 | 45.5 | 36% |
| Oceania | \$138 | 4.9 | -10% |
| Western Europe | \$916 | 32.2 | 2% |
| Global | \$2,849 | 100.0 | 21% |



The estimated global total revenue from coaching in 2019 was **\$2.849 billion U.S. dollars**, representing a 21% increase over the 2015 estimate.

The Coaching Profession: Size and Scale

The size and scale estimates for numbers of coach practitioners and revenue/income from coaching are summarized in the table below.

The coaching profession: Size and scale

| | Coach practitioners | Active | Annual revenue / income from coaching | Total revenue |
|----------------------------------|---------------------|------------|---------------------------------------|----------------|
| | # | % | USD | USD million |
| Asia | 4,600 | 84% | \$33,600 | \$126 |
| Eastern Europe | 6,300 | 87% | \$19,100 | \$101 |
| Latin American and the Caribbean | 11,000 | 86% | \$20,900 | \$191 |
| Middle East and Africa | 2,800 | 86% | \$34,900 | \$80 |
| North America | 23,300 | 93% | \$62,500 | \$1,296 |
| Oceania | 2,600 | 90% | \$61,100 | \$138 |
| Western Europe | 20,400 | 92% | \$51,100 | \$916 |
| Global | 71,000 | 90% | \$47,100 | \$2,849 |

Drivers of Annual Revenue/Income from Coaching

Annual revenue/income from coaching is driven by the fee per one-hour coaching session, active clients and weekly hours working as a coach. As illustrated in the table below, annual revenue from coaching increases with the fee per one-hour session, the number of current active clients and the number of weekly hours spent working as a coach practitioner. Those topics are discussed in the next part of this section.

Drivers of annual revenue/income from coaching

| | Fee per one-hour session | Current active clients | Weekly hours |
|---------------------|--------------------------|------------------------|--------------|
| Annual Revenue USD | USD | Average # | Average # |
| Less than \$1,000 | \$91 | 7.7 | 6.6 |
| \$1,000-\$9,999 | \$126 | 7.1 | 6.8 |
| \$10,000-\$29,999 | \$189 | 10.0 | 10.2 |
| \$30,000-\$49,999 | \$242 | 13.7 | 14.3 |
| \$50,000-\$74,999 | \$282 | 16.7 | 17.6 |
| \$75,000-\$99,999 | \$324 | 18.1 | 19.7 |
| \$100,000-\$149,999 | \$374 | 20.1 | 21.5 |
| \$150,000+ | \$522 | 21.6 | 25.7 |
| All | \$223 | 11.7 | 12.1 |

Average Fees Reported Per One-hour Coaching Session

Coach practitioners with active clients were asked to report their average fee for a one-hour coaching session.

The overall average fee in 2019 was **\$223 U.S. dollars**, ranging from \$273 in Western Europe to \$122 in Latin America and the Caribbean.

Globally, average fees for a one-hour session are estimated to have declined by -4% when compared with 2015 (\$231). The estimated changes in hourly fees expressed in U.S. dollars should be interpreted cautiously, as they partly reflect the strengthening of the U.S. dollar as outlined above. For example, when measured in international dollars at PPPs, average hourly fee rates rose by 9% (from PPP\$264 in 2015 to PPP\$289 in 2019).

Globally, one in two coach practitioners said their fee per one-hour session was less than \$174 U.S. dollars (the median) while 50% said their fees were exceeded \$174 U.S. dollars.

Fees per one-hour coaching session

| | 2019 USD | % change 2015-2019 |
|---------------------------------|--------------|--------------------|
| Asia | \$242 | 4% |
| Eastern Europe | \$132 | -5% |
| Latin America and the Caribbean | \$122 | -22% |
| Middle East and Africa | \$141 | -2% |
| North America | \$244 | 4% |
| Oceania | \$260 | -11% |
| Western Europe | \$273 | -5% |
| Global | \$223 | -4% |

The variation in the reported fee per one-hour session reflects a range of factors, including:

- The characteristics of the coach practitioner (i.e., more experienced coach practitioners tend to report higher average fees)
- The nature of the client (i.e., hourly fees per session tend to be higher for coach practitioners who work primarily with executives, business owners or managers, and lower for those work primarily with personal clients)

The factors that are linked to hourly fee rates also tend to overlap (i.e., more experienced coach practitioners are more likely to have executives as their clients). The overlaps between the characteristics of the coach practitioner and the nature of the client are explored in Section 4 of this report. The relationships with hourly fee rates are outlined in further detail in Section 3.

At this juncture, it is useful to highlight two factors that are strongly linked to variations in hourly fee rates.

Fees reported per one-hour coaching session vary strongly with the coach practitioners' experience, ranging from an average of \$300 U.S. dollars per one-hour session for coach practitioners with more than 10 years of experience to \$130 U.S. dollars per hour for coach practitioners with less than one year of experience.

Similarly, the fees reported per one-hour session are highest for coach practitioners with a majority of executive clients (\$330) and lowest for those working mainly with personal clients (\$130).

Number of Active Clients

In 2019, the average active coach practitioner had 11.7 clients, up by 6% compared with 2015.

Across the regions, coach practitioners in Oceania reported the highest average number of clients (13.8). The lowest number was reported in Eastern Europe (9). The same pattern was observed in 2015, when the average number of clients was also lowest in Eastern Europe (7.9) and highest in Oceania (13.3).

Number of clients: Average and percent change 2015-2019

| | 2015 | 2019 | % increase |
|---------------------------------|-------------|-------------|------------|
| Asia | 9.8 | 10.5 | 7% |
| Eastern Europe | 7.9 | 9.0 | 13% |
| Latin America and the Caribbean | 11.3 | 13.2 | 17% |
| Middle East and Africa | 11.2 | 11.4 | 1% |
| North America | 11.7 | 12.1 | 3% |
| Oceania | 13.3 | 13.8 | 4% |
| Western Europe | 10.4 | 11.1 | 7% |
| Global | 11.0 | 11.7 | 6% |

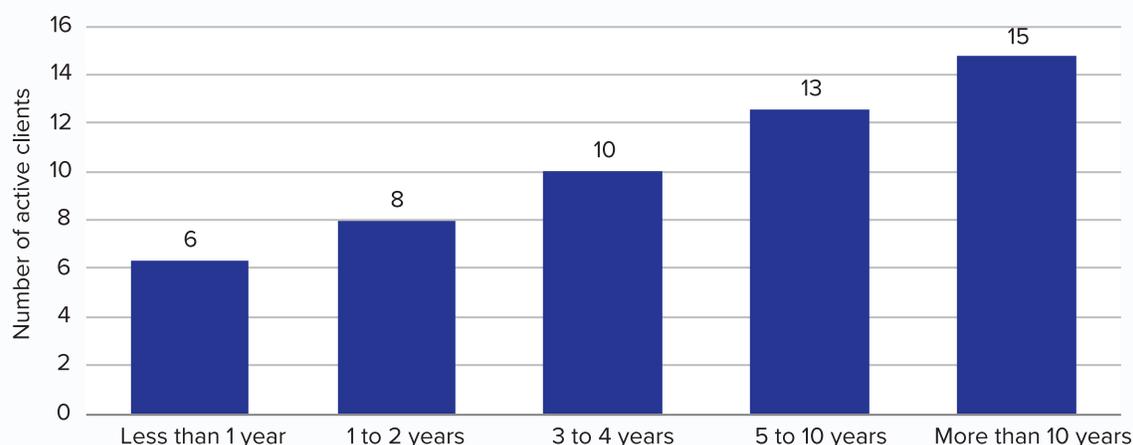
The number of clients per coach practitioner shows considerably greater variability *within* regions. Typically, a little over one in four coach practitioners (27%) has four or fewer clients. But a comparable proportion (26%) has more than 14 clients. Comparable variability in the distribution of clients can be observed within each of the seven regions.

Number of clients

| | Average number of clients | 4 or fewer | 5-8 | 9-14 | More than 14 |
|---------------------------------|---------------------------|------------|-----------|-----------|--------------|
| | # | % | % | % | % |
| Asia | 10.5 | 28 | 30 | 21 | 21 |
| Eastern Europe | 9.0 | 33 | 34 | 18 | 15 |
| Latin America and the Caribbean | 13.2 | 31 | 26 | 17 | 27 |
| Middle East and Africa | 11.4 | 28 | 26 | 20 | 25 |
| North America | 12.1 | 24 | 27 | 21 | 28 |
| Oceania | 13.8 | 22 | 26 | 21 | 31 |
| Western Europe | 11.1 | 29 | 27 | 20 | 24 |
| Global | 11.7 | 27 | 27 | 20 | 26 |

As with hourly fee rates, years of coaching experience are linked to client numbers. Thus, more experienced coach practitioners tend to have larger numbers of clients. Coach practitioners with 10 or more years of experience have 15 clients, on average, compared to six among those with less than one year of experience. The linkage between years' experience and client numbers was also reported in 2015 and 2011. The stable relationship between years of coaching experience and client volume provides one illustration of career progression, as the coach practitioner develops his or her business over a period of years.

Average number of clients by coaching experience



Other factors associated with higher numbers of clients include the nature of the position held by the coach’s clients and the proportion of clients who are sponsored (i.e., those clients whose coaching is paid for by a third party). The linkages are further explored in Section 3 of this report.

Weekly Hours Working as a Coach Practitioner

In 2019, coach practitioners spent an average of 12 hours per week delivering coaching services, representing a decline of 13% compared with the average hours worked in 2015 (14). With the exception of Eastern Europe (-4%), there was not a great deal of variation across the regions in the percentage reduction in hours.

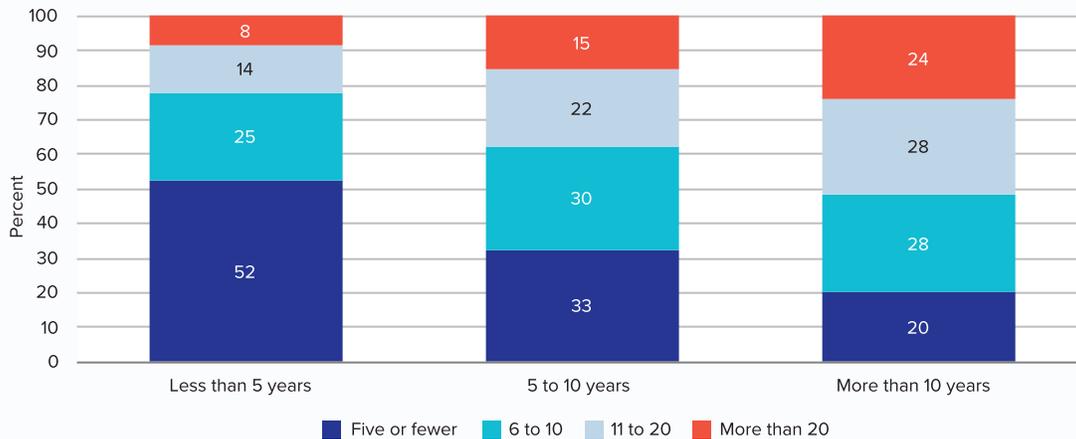
Weekly hours working as a coach practitioner: Average and percent change 2015-2019

| | 2015 | 2019 | % change |
|---------------------------------|-------------|-------------|-------------|
| Asia | 10.5 | 8.7 | -16% |
| Eastern Europe | 8.6 | 8.2 | -4% |
| Latin America and the Caribbean | 14.8 | 12.8 | -13% |
| Middle East and Africa | 12.2 | 10.5 | -14% |
| North America | 15.9 | 13.6 | -14% |
| Oceania | 15.5 | 12.9 | -17% |
| Western Europe | 13.3 | 11.9 | -11% |
| Global | 13.9 | 12.1 | -13% |

The rapid growth in coaching between 2015 and 2019 may be one part of the explanation for the reduction in average weekly hours over that same period. Typically, weekly hours working as a coach practitioner are positively linked to the number of years of experience. For example, 52% of coach practitioners with less than five years’ experience work five or fewer hours per week as a coach practitioner compared 20% of those with 10 or more years of experience.

A second possibility is that coach practitioners may have been developing additional services, such as consulting, mentoring, etc., and re-balancing their allocation of time within their overall ‘portfolio’ of client offerings. The 2019 survey included a question on coach practitioners’ allocation of time to the various services they offer, which provides a baseline for future reference.

Weekly hours working as a coach practitioner and years of coaching experience



From a regional perspective, average weekly hours worked as a coach practitioner ranged from 8.2 in Eastern Europe to 13.6 in North America. However, like client numbers, there is greater variability within regions in hours worked. Typically, 37% of coach practitioners work five or fewer hours a week as a coach. By contrast, 15% work more than 20 hours a week delivering coaching services. The proportion of coach practitioners working more than 20 hours a week varies by region, from 5% in Eastern Europe to 19% in North America. Those contrasts are part of the explanation for the regional contrasts in average annual revenue/income from coaching discussed previously.

Weekly hours working as a coach practitioner:

| | Average hours per week | 5 or fewer | 6-10 | 11-20 | More than 20 |
|---------------------------------|------------------------|------------|-----------|-----------|--------------|
| | # | % | % | % | % |
| Asia | 8.7 | 50 | 29 | 14 | 7 |
| Eastern Europe | 8.2 | 51 | 32 | 13 | 5 |
| Latin America and the Caribbean | 12.8 | 32 | 31 | 22 | 16 |
| Middle East and Africa | 10.5 | 40 | 29 | 20 | 11 |
| North America | 13.6 | 33 | 25 | 22 | 19 |
| Oceania | 12.9 | 33 | 27 | 23 | 17 |
| Western Europe | 11.9 | 35 | 28 | 22 | 14 |
| Global | 12.1 | 37 | 28 | 21 | 15 |

The hours spent working as a coach practitioner also varies with the type of coaching position held. External coach practitioners (professional coach practitioners who are either self-employed or partner with other professional coach practitioners to form a coaching business) tend to devote more weekly hours to coaching than internal coach practitioners (professional coach practitioners who are employed within an organization and have specific coaching responsibilities identified in their job descriptions).

Weekly hours working as a coach practitioner (average)

| | All | External Coach Practitioner | Internal Coach Practitioner | Both External and Internal Coach Practitioner | More than 20 hours |
|---------------------------------|-------------|-----------------------------|-----------------------------|---|--------------------|
| | # | # | # | # | % |
| Asia | 8.7 | 8.9 | 7.9 | 7.3 | 7 |
| Eastern Europe | 8.2 | 8.3 | 6.7 | 7.7 | 5 |
| Latin America and the Caribbean | 12.8 | 12.6 | 7.1 | 13.9 | 16 |
| Middle East and Africa | 10.5 | 10.9 | 7.1 | 9.7 | 11 |
| North America | 13.6 | 13.8 | 13.1 | 12.2 | 19 |
| Oceania | 12.9 | 13.2 | 9.8 | 10.4 | 17 |
| Western Europe | 11.9 | 12.1 | 7.5 | 10.5 | 14 |
| Global | 12.1 | 12.2 | 10.1 | 11.1 | 15 |

Revenue/Income Reported per Hour

The fee per one-hour coaching session refers to the amount reported by coach practitioners for time spent with the client. However, coach practitioners also undertake additional supporting activities that do not generate fee income, including preparation, networking and training.

It is therefore useful to consider hourly revenue/income recovered from coaching; i.e., annual revenue/income divided by the annualized total number of hours spent working as a coach, including both time with the client and on additional supporting activities.

On that basis, the average hourly revenue recovered for all coach practitioners worldwide is an estimated \$75 U.S. dollars, equivalent to 34% of the average fee for a one-hour coaching session (\$223).

Coach practitioners recovered a higher hourly amount in 2019 compared with 2015. On average, hourly recovery rose by 7% compared to 2015 (\$70).

Hourly revenue recovered

| | USD | % of hourly fee reported | % change 2015-2019 |
|---------------------------------|-------------|--------------------------|--------------------|
| Asia | \$74 | 31 | 7.0 |
| Eastern Europe | \$45 | 34 | 9.1 |
| Latin America and the Caribbean | \$31 | 26 | -10.8 |
| Middle East and Africa | \$64 | 45 | 11.7 |
| North America | \$88 | 36 | 17.2 |
| Oceania | \$91 | 35 | 0.2 |
| Western Europe | \$83 | 30 | 4.4 |
| Global | \$75 | 34 | 6.9 |

Summary of Revenue Drivers

The key revenue drivers are summarized in the table below.

Summary of revenue drivers

| | Average fee reported per one-hour session | Average hourly revenue recovered | Hours per week (average) | Active clients currently coaching (average) |
|---------------------------------|---|----------------------------------|--------------------------|---|
| | USD | USD | # | # |
| Asia | \$242 | \$74 | 8.7 | 10.5 |
| Eastern Europe | \$132 | \$45 | 8.2 | 9.0 |
| Latin America and the Caribbean | \$122 | \$31 | 12.8 | 13.2 |
| Middle East and Africa | \$141 | \$64 | 10.5 | 11.4 |
| North America | \$244 | \$88 | 13.6 | 12.1 |
| Oceania | \$260 | \$91 | 12.9 | 13.8 |
| Western Europe | \$273 | \$83 | 11.9 | 11.1 |
| Global | \$223 | \$75 | 12.1 | 11.7 |

Key Trends

In addition to questions about their current position, coach practitioners with current active clients were asked to reflect on the last 12 months and to look ahead to the next 12 months, in relation to each of four business/practice indicators, as follows:

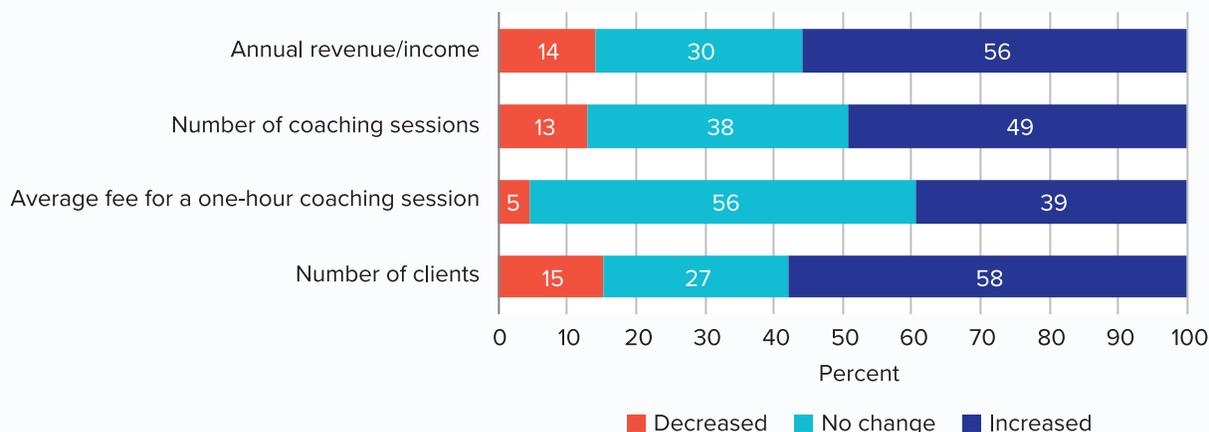
- Number of clients
- Average fee for a one hour coaching session
- Number of coaching sessions
- Annual revenue/income

The remainder of this section presents the survey results for those topics, commencing with the respondents' reflections on the last 12 months.

For each of the four business/practice indicators, respondents were asked to say whether they had experienced an increase, decrease or no change in the last 12 months compared to the previous 12 months.

Overall, respondents were more likely to report an increase than a decrease in hourly fees, coaching sessions, clients and revenues. Almost six in 10 respondents with active clients (58%) said they had experienced an increase in the number of clients in the past 12 months as compared to the preceding 12 months. Only 15% said their client numbers had fallen, giving a positive net balance of +43 percentage points (the difference between the percentage citing an increase and those saying client numbers had decreased).

Change Experience - Last 12 months



The net balances were also strongly positive for the remaining indicators, as follows:

- **Average fee for a one-hour coaching session** – 39% reporting an increase versus 5% saying their fee had decreased for a positive net balance of +34%.
- **Number of coaching sessions** – almost one in two said sessions had increased compared with 13% experiencing a decline, giving a net balance of +36%.
- **Annual revenue/income** – 56% with an increase versus 14% facing declining revenues, for a positive net balance of 42%.

Overall, increasing annual revenue/income is most strongly linked to increases in the number of clients and coaching sessions. Increasing average fee income is less likely to act as a driver of revenue/income growth, albeit very few coach practitioners (5%) reporting seeing a decline in their average fees.

The Regional Pattern

The positive global picture in relation to the four business indicators was strongly reflected across the regions. In each region, a majority of coach practitioners said they had experienced an increase in clients over the past 12 months. Apart from Latin America and the Caribbean (51%), the proportion reporting an increase was within one to two percentage points of the global average.

The regional pattern: Percent of coach practitioners reporting an increase in past 12 months compared to previous 12 months:

| | Number of clients (%) | Average fee for a one-hour coaching session (%) | Number of coaching sessions (%) | Annual revenue / income (%) |
|---------------------------------|-----------------------|---|---------------------------------|-----------------------------|
| Asia | 60 | 39 | 54 | 59 |
| Eastern Europe | 59 | 46 | 56 | 60 |
| Latin America and the Caribbean | 51 | 35 | 41 | 49 |
| Middle East and Africa | 59 | 39 | 54 | 55 |
| North America | 59 | 43 | 50 | 58 |
| Oceania | 59 | 37 | 48 | 56 |
| Western Europe | 58 | 35 | 47 | 54 |
| Global | 58 | 39 | 49 | 56 |

The regional pattern in average fees for a one-hour coaching session was more variable, with the proportion reporting an increase ranging from 43% in North America to 35% in Western Europe and Latin America and the Caribbean. However, very few coach practitioners said their average fee had decreased, varying in a narrow range between 3% and 6% in all regions except Latin America and the Caribbean (10%).

The recent trend in coaching sessions also displayed a degree of variability across the regions, with the proportion reporting an increase ranging from 56% in Eastern Europe to 41% in Latin America and the Caribbean. Though, in Latin America and the Caribbean, decreasing numbers of sessions were reported by just 11% of coach practitioners, slightly below the global average (13%).

The regional pattern: Percent of coach practitioners reporting a decrease in past 12 months compared to previous 12 months:

| | Number of clients (%) | Average fee for a one-hour coaching session (%) | Number of coaching sessions (%) | Annual revenue / income (%) |
|---------------------------------|-----------------------|---|---------------------------------|-----------------------------|
| Asia | 15 | 3 | 12 | 12 |
| Eastern Europe | 21 | 10 | 18 | 23 |
| Latin America and the Caribbean | 13 | 4 | 11 | 13 |
| Middle East and Africa | 15 | 5 | 14 | 12 |
| North America | 19 | 6 | 16 | 18 |
| Oceania | 13 | 4 | 12 | 11 |
| Western Europe | 14 | 4 | 13 | 14 |
| Global | 15 | 5 | 13 | 14 |

Buoyed by positive trends in the number of clients and coaching sessions, the majority of coach practitioners in almost all regions said their annual revenue/income from coaching had increased in the past 12 months. Comparing the proportion reporting an increase with those reporting a decrease, the net balance in annual revenue/income was strongly positive across all regions, from +47 percentage points in Asia to +36 in Latin America and the Caribbean.

The positive trends in the key business indicators reported by coach practitioners serve to reinforce the points made previously regarding the effect of factors such as exchange rate fluctuations in regional comparisons of revenue/income expressed in terms of U.S. dollars.

Looking Ahead: Next 12 Months

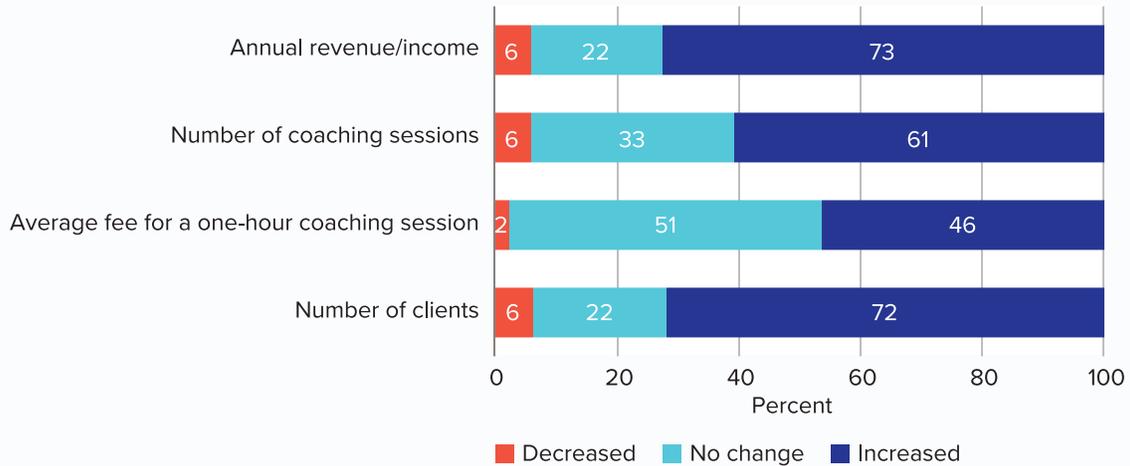
Coach practitioners were also asked to look ahead over the next 12 months and say whether they expected an increase, decrease or no change in the four business indicators. *The survey was undertaken in 2019 and coach practitioners were therefore asked to reflect on their prospects for 2020. Survey respondents' expectations for 2020 were therefore sought prior to the coronavirus pandemic. That context serves to limit what may be said about expectations for 2020.*

Prior to the pandemic, coach practitioners were optimistic regarding the business outlook for coaching in 2020. Almost three in four (73%) expected to see an increase in their annual revenue/income, driven by a majority of coach practitioners anticipating growth in coaching sessions (61%) and the number of clients (72%).

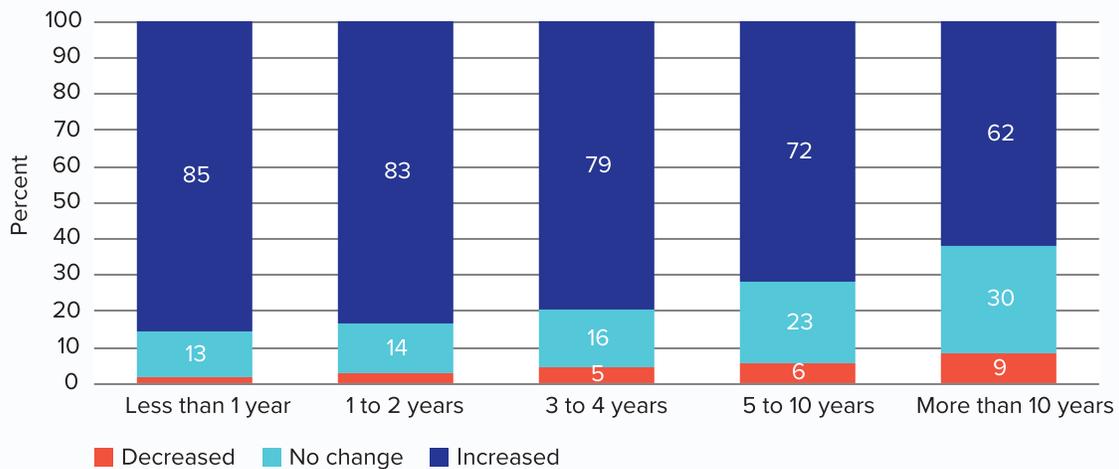
The level of optimism was higher among coach practitioners in the early stages of their career. Among those with less than one years' experience, 85% said they expected annual revenue/income to increase compared with 62% of those with 10 or more years of experience.

Expectations for growth in 2020 were widely shared across the regions. Over three in four coach practitioners in Eastern Europe (79%), Middle East and Africa (78%) and Asia (76%) anticipated an increase in annual revenue/income. In each of the other regions, around seven in 10 coach practitioners expected their revenue/income would go up in 2020.

Expected change - Next 12 months



Annual revenue/income: Expected change - next 12 months by years coaching experience



The regional pattern

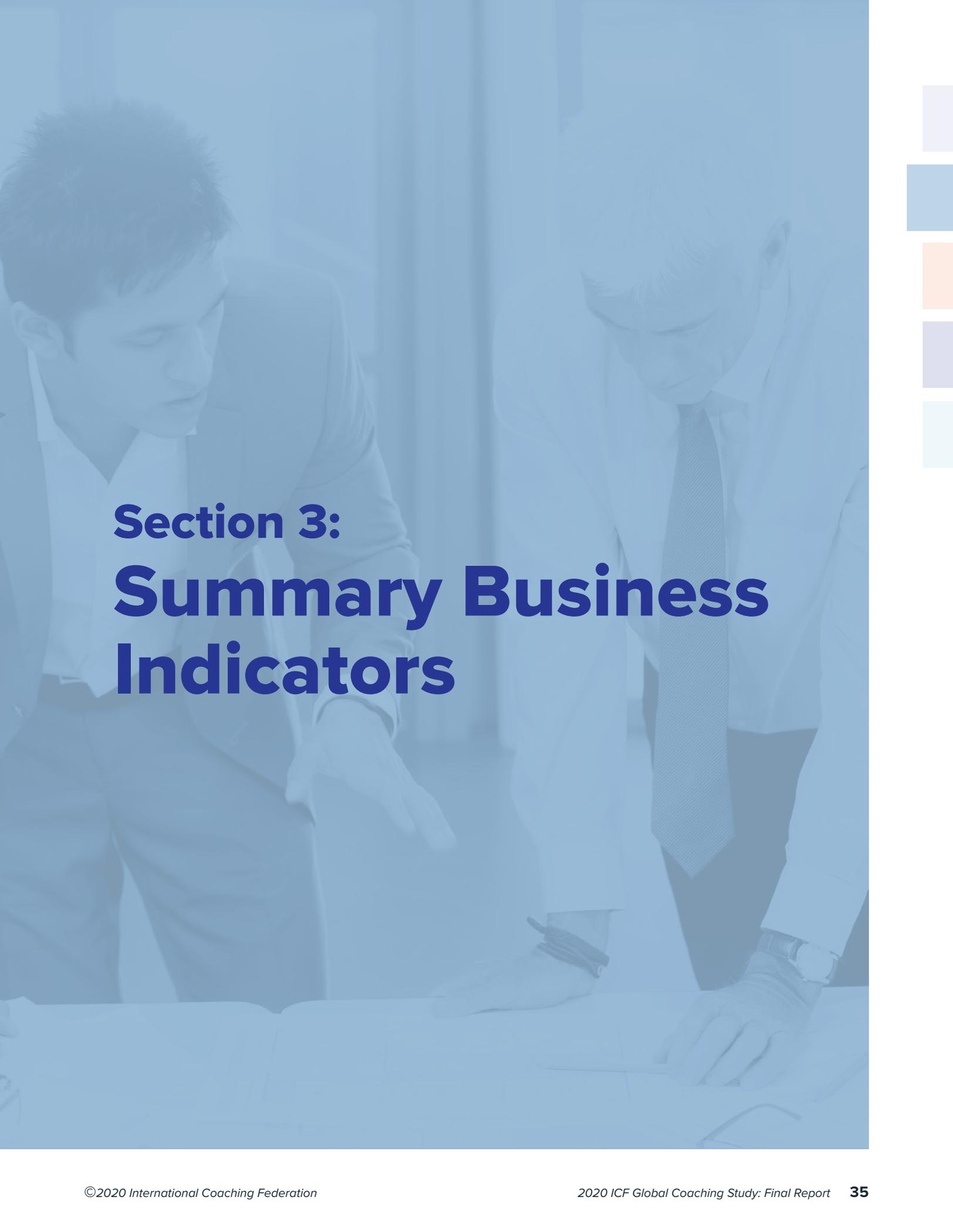
Percent expecting an increase over next 12 months in:

| | Number of clients (%) | Average fee for a one-hour coaching session (%) | Number of coaching sessions (%) | Annual revenue / income (%) |
|---------------------------------|-----------------------|---|---------------------------------|-----------------------------|
| Asia | 76 | 53 | 69 | 76 |
| Eastern Europe | 76 | 58 | 70 | 79 |
| Latin America and the Caribbean | 69 | 46 | 52 | 69 |
| Middle East and Africa | 79 | 52 | 70 | 78 |
| North America | 71 | 46 | 61 | 74 |
| Oceania | 69 | 41 | 56 | 70 |
| Western Europe | 70 | 41 | 59 | 69 |
| Global | 72 | 46 | 61 | 73 |

KEY POINTS SUMMARY

The following are the key points from the analysis of the size and scope of the profession:

- The coaching profession has continued to expand. In 2019, the estimated number of professional coach practitioners reached **77,700**, representing a 36% increase on the 2015 global estimate.
- The estimated number of coach practitioners worldwide increased by one-third between 2015 and 2019, to **71,000**.
- The number of coach practitioners grew in all regions, most notably in the emerging regions of Latin America and the Caribbean (+179%), Asia (+55%) and Eastern Europe (+38%).
- The indicative estimate for the number of managers/leaders using coaching skills in 2019 is **15,900**, a 46% increase on the 2015 estimate.
- Nine in 10 coach practitioners said they currently have active clients. In 2019, they generated an estimated annual revenue/income of **\$2.849 billion** U.S. dollars, representing a 21% increase over the 2015 estimate.
- Measured in U.S. dollar, there are pronounced differences across the world regions in average annual revenue/income from coaching and hourly fee levels. The strengthening of the U.S. dollar in recent years makes it more difficult to identify trends in the revenue and fee indicators.

A blue-tinted photograph of two men in business suits leaning over a table, looking at documents. The man on the left is pointing at a document, while the man on the right is looking down at it. The background is a blurred office setting.

Section 3:

Summary Business Indicators

INTRODUCTION

This section presents further detail and analysis of the key business indicators, i.e., average annual revenue/income from coaching, fee per one-hour coaching session, clients and weekly hours.

Annual revenue/income from coaching varies with the fees that coach practitioners charge per one-hour coaching session, the number of active clients and the hours that they work delivering coaching services. These are the drivers of income/revenue from coaching.

The focus in this section is on the relationships between those indicators and how they vary with the attributes of coach practitioners and the clients that they serve. For example, hours per week varies strongly with the number of clients. Revenue/income drivers are also related to coach attributes, such as years of experience, and the nature of the services delivered by the coach.

Those linkages with the key business indicators are discussed in this section under the following headings:

- Demographic profile of coach practitioners
- Time allocated to coaching
- Coaching services
- Training and credentialing
- The client
- The interaction between coach and client

Summary Business Indicators: Demographic Profile

The revenue/income received from coaching is linked to a variety of factors, including attributes of the coach practitioner, the range and mix of services offered, and client attributes. These factors are often interrelated. For example, coaching experience is positively associated with the likelihood of specializing in Business Coaching.

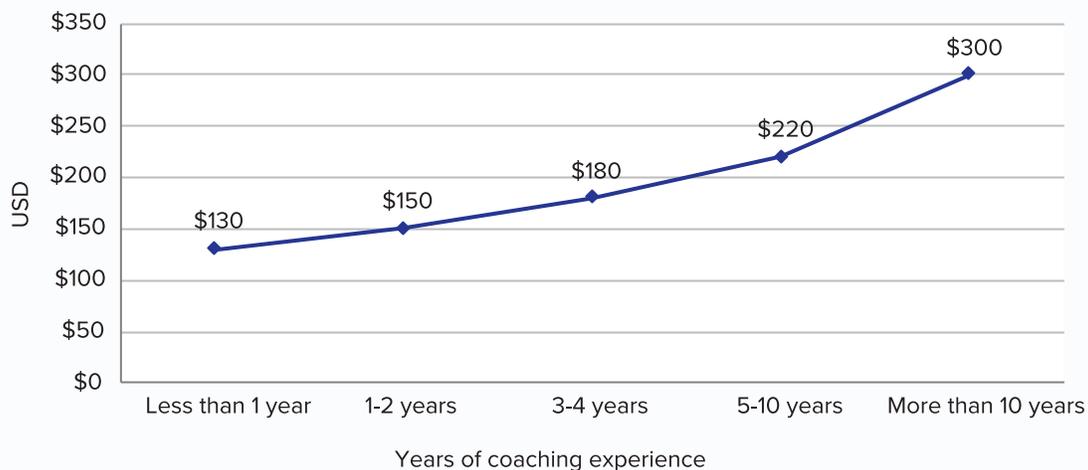
When these factors are examined together, years of experience continues to rank as the single most important predictor of a coach's income/revenue from coaching. Annual revenue/income from coaching increases from an average of \$16,600 U.S. dollars among coach practitioners with less than one year of experience to \$76,300 U.S. dollars for those with more than 10 years of experience.

Annual revenue/income from coaching by years of experience



One reason that annual revenue/income rises with years of coaching experience is that, on average, more experienced coach practitioners command higher fees per one-hour coaching session. The average fee per one-hour session rises from \$130 U.S. dollars for coach practitioners with less than one year of experience to \$300 U.S. dollars for coach practitioners with more than 10 years of experience.

Average fee per one-hour session by years of experience



The number of clients and hours worked also vary with the level of coaching experience. For example, coach practitioners with less than one year of experience work, on average, six hours per week as a coach, less than half the average number of weekly hours of a coach practitioner with 10 or more years of experience (15 hours).

Fees and revenue are both positively linked to age, reflecting the link between age and years of coaching experience.

Female coach practitioners reported an average annual income/revenue from coaching (\$43,700 U.S. dollars) that was almost one-fifth lower than their male counterparts (\$53,900 U.S. dollars). This shows that the revenue gap is closing: The ratio of female to male average revenue/income was 68% in the 2011 survey and 71% in the 2015 survey. The revenue gap between male and female coach practitioners is likely to reflect a range of factors and a fuller explanation is beyond the scope of this study.

Summary business indicators: Demographic profile

| | | Annual revenue USD | Reported one-hour fee USD | Clients # | Hours # |
|-------------------|--------------------|-----------------------|------------------------------|--------------|------------|
| Experience | Less than 1 year | \$16,600 | \$130 | 6 | 8 |
| | 1-2 years | \$22,500 | \$150 | 7 | 10 |
| | 3-4 years | \$29,600 | \$180 | 9 | 12 |
| | 5-10 years | \$42,300 | \$220 | 12 | 15 |
| | More than 10 years | \$76,300 | \$300 | 15 | 18 |
| Age | 34 years and under | \$25,800 | \$140 | 8 | 11 |
| | 35-44 years | \$29,900 | \$180 | 10 | 12 |
| | 45-54 years | \$48,100 | \$230 | 11 | 14 |
| | 55-64 years | \$56,200 | \$240 | 12 | 15 |
| | 65 years and over | \$54,900 | \$250 | 11 | 15 |
| Gender | Female | \$43,700 | \$210 | 11 | 14 |
| | Male | \$53,900 | \$240 | 11 | 14 |



Fees and revenue are both positively linked to age, reflecting the link between age and years of coaching experience.

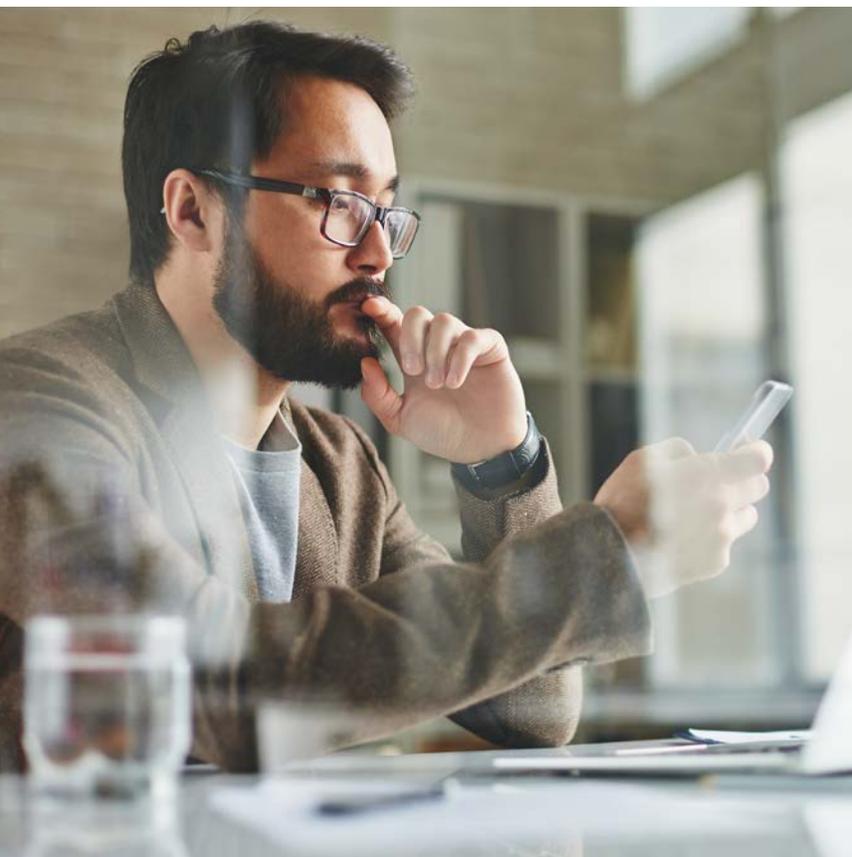
Summary Business Indicators: Time Allocated to Coaching

Almost all coach practitioners (94%) offer services in addition to coaching, such as consulting, training, etc. (see Section 4 for further details). For the 2019 survey, respondents were asked to say how they allocate their time between coaching and any additional services that they offer.

The proportion of time spent coaching mainly affects the amount of annual revenue/income from coaching. The greater the proportion of time spent coaching, the larger the revenue/income from coaching. Similarly, the number of clients and hours spent coaching are positively linked to the proportion of time spent coaching. Those linkages are entirely to be expected. They also serve to emphasize that the business indicators reported in this section are entirely related to delivery of coaching services. No information is collected on the revenue/income that coach practitioners derive from additional services that they offer.

Summary business indicators: Time allocated to coaching

| | | Annual revenue | Reported one-hour fee | Clients | Hours |
|--------------------------------|---------------|----------------|-----------------------|---------|-------|
| | | USD | USD | # | # |
| Time allocated to coaching (%) | Less than 20% | \$22,100 | \$210 | 7 | 10 |
| | 20% to 39% | \$37,500 | \$220 | 9 | 14 |
| | 40% to 59% | \$49,800 | \$220 | 11 | 16 |
| | 60% to 79% | \$60,900 | \$230 | 13 | 17 |
| | 80% to 100% | \$59,300 | \$230 | 15 | 18 |



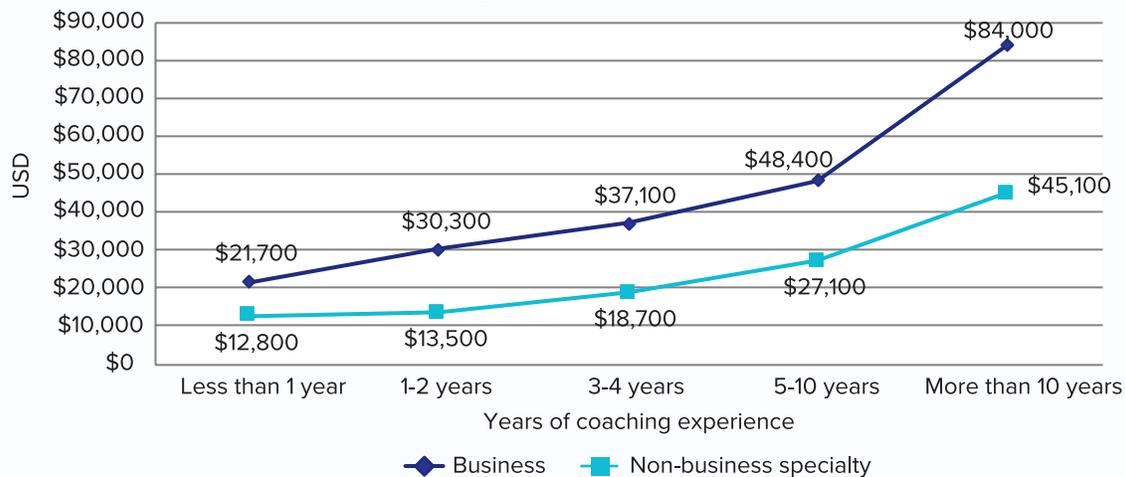
Almost all coach practitioners (94%) offer services in addition to coaching, such as consulting, training, etc.

Summary Business Indicators: Coaching Services

Coach practitioners with a Business Coaching specialty (i.e., coach practitioners who identified their main area of coaching as Leadership Coaching, Executive Coaching, Business/Organization Coaching or Small Business Coaching) tend to have higher levels of revenue/income from coaching compared with the other main specialties.

Partly, this reflects the linkage between years of experience and the likelihood of specializing in Business Coaching. However, it is also the case that, holding years of coaching experience constant, Business Coaches earn more than other coach practitioners, on average. For example, Business Coaches with three to four years of experience generate an annual average of \$37,100 compared with \$18,700 for coach practitioners with a non-business specialty.

Annual revenue/income from coaching by years of experience and main area of coaching



The higher annual revenue/income from Business Coaching specialties is also driven by a higher average fee per one-hour coaching session (\$260 U.S. dollars) compared to other coaching specialties (\$150 U.S. dollars). Number of clients and hours worked differ much less within the main area of coaching.



Coach practitioners with a Business Coaching specialty tend to have higher levels of revenue/income from coaching compared with the other main specialties.

Summary business indicators: Coaching services

| | | Annual revenue | Reported one-hour fee | Clients | Hours |
|------------------------------------|----------------------------|----------------|-----------------------|---------|-------|
| | | USD | USD | # | # |
| Internal/external | External | \$48,900 | \$240 | 11 | 14 |
| | Internal | \$50,300 | \$170 | 12 | 11 |
| | Both | \$37,300 | \$170 | 11 | 12 |
| Main area of coaching | Business | \$57,100 | \$260 | 12 | 15 |
| | Leadership | \$56,000 | \$250 | 12 | 14 |
| | Business organizations | \$46,200 | \$230 | 11 | 15 |
| | Executive | \$71,900 | \$310 | 12 | 15 |
| | Small business | \$39,500 | \$180 | 12 | 16 |
| | Other | \$25,300 | \$150 | 10 | 13 |
| | Life, vision & enhancement | \$19,500 | \$140 | 8 | 11 |
| | Career | \$28,000 | \$160 | 10 | 13 |
| | All other | \$21,400 | \$120 | 11 | 13 |
| Additional services offered | None | \$44,100 | \$210 | 10 | 12 |
| | One | \$41,900 | \$200 | 10 | 13 |
| | Two | \$46,200 | \$220 | 10 | 14 |
| | Three | \$49,200 | \$240 | 11 | 14 |
| | Four or more | \$49,000 | \$230 | 12 | 14 |

Hourly fees per session by years of experience and main area of coaching



Within the main coaching specialties, the hourly fee per session is positively linked to years of coaching experience.

Summary Business Indicators: Training and Credentialing

Respondents who were members of one or more professional associations reported 30% higher average revenue/income from coaching (\$48,800 U.S. dollars) compared to those who are not currently members (\$37,500 U.S. dollars).

Those saying they hold one or more credentials from a professional association reported 25% higher average annual revenue/income from coaching compared to those without a credential (\$49,300 U.S. dollars compared to \$39,400 U.S. dollars).

Membership affiliation and possession of credentials are also associated with above-average fees per one-hour coaching session. At least in part, that reflects the linkage between hourly fees and years of coaching experience; coach practitioners with one or more memberships and/or credentials tend to have more years of coaching experience compared to those who do not have a membership and/or a credential (see Section 4). Also, Business Coaching is more prevalent as a main specialty among those with one or more memberships and/or a coaching credential.

Summary business indicators: Training and credentialing

| | | Annual revenue | Reported one-hour fee | Clients | Hours |
|--------------------|------|----------------|-----------------------|---------|-------|
| | | USD | USD | # | # |
| Membership | Any | \$48,800 | \$230 | 12 | 12 |
| | None | \$37,500 | \$180 | 11 | 11 |
| Credentials | Any | \$49,300 | \$230 | 12 | 12 |
| | None | \$39,400 | \$200 | 10 | 11 |



Respondents who were members of one or more professional associations reported 30% higher average revenue/income from coaching compared to those who are not currently members.

Summary Business Indicators: The Client

The key business indicators (annual revenue/income, fees per one-hour coaching session, active clients and hours) vary with the characteristics of the client. In particular, average income/revenue and hourly fees are higher for:

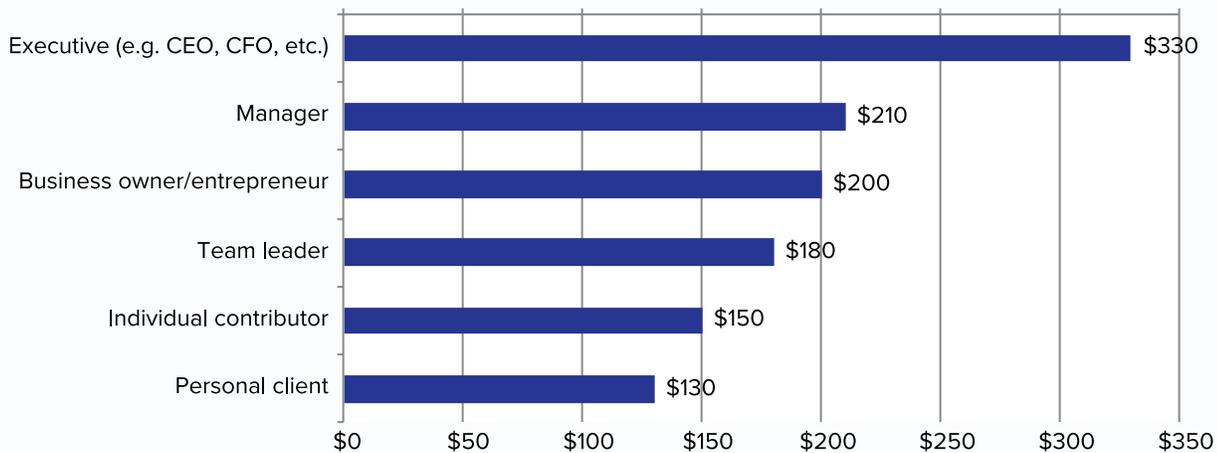
- Coach practitioners with a majority of their clients in executive positions
- The proportion of active clients that are sponsored (i.e., coaching is paid for by someone other than the client)

For example, among coach practitioners for whom the majority of clients are executives, the average fee quoted per one-hour session was \$330 U.S. dollars. This was over twice the average fee reported by coach practitioners where the majority of clients are individual contributors (\$150 U.S. dollars) or personal clients (\$130 U.S. dollars). Consequently, annual revenue/income from coaching is significantly higher for those who mainly coach executives (\$80,900 U.S. dollars) when compared with the global average for all coach practitioners (\$47,100 U.S. dollars).

Hourly fees and annual revenues are also positively linked to the proportion of a coach's clients who are sponsored. The higher the sponsored client share, the higher the hourly fee and annual revenue.

Each of the foregoing client attributes are linked to variations in the attributes of coach practitioners themselves. As discussed in Section 4, executives are more likely to be coached by more-experienced coach practitioners and those with a Business Coaching specialty. These linkages, in turn, help to explain the higher fees and annual revenues earned by more-experienced coach practitioners and those with a Business Coaching specialty.

Average fee reported per one-hour coaching session by client position



Summary business indicators: The client

| | | Annual revenue | Reported one-hour fee | Clients | Hours |
|---------------------------------------|---------------------------------|----------------|-----------------------|---------|-------|
| | | USD | USD | # | # |
| Position (majority of clients) | Executive (e.g. CEO, CFO, etc.) | \$80,900 | \$330 | 14 | 15 |
| | Business owner/entrepreneur | \$43,600 | \$200 | 11 | 13 |
| | Manager | \$38,800 | \$210 | 11 | 11 |
| | Team leader | \$33,500 | \$180 | 11 | 11 |
| | Individual contributor | \$29,300 | \$150 | 11 | 10 |
| | Personal client | \$18,700 | \$130 | 9 | 10 |
| | Other | \$40,800 | \$190 | 16 | 13 |
| Sponsored | No clients sponsored | \$24,700 | \$150 | 8 | 9 |
| | 1%-50% sponsored | \$38,600 | \$190 | 12 | 13 |
| | 51%-95% sponsored | \$58,700 | \$250 | 15 | 14 |
| | 96%+ sponsored | \$64,000 | \$300 | 12 | 12 |



The higher the sponsored client share, the higher the hourly fee and annual revenue.

Summary Business Indicators: The Interaction between Coach Practitioner and Client

The summary business indicators for the interaction between coach and client are presented under the following headings in the accompanying table:

- The length of a coaching engagement
- The duration of coaching sessions
- The methods by which coaching is delivered

As discussed in further detail in Section 4, the longer coaching engagements tend to be delivered by more-experienced coach practitioners and those with a Business Coaching specialty. Those linkages are reflected in a positive relationship, on average, between the length of the coaching engagement and annual revenue/income and hourly fee rates.

Summary business indicators: Coaching services

| | | Annual revenue | Reported one-hour fee | Clients | Hours |
|---|---------------------|----------------|-----------------------|---------|-------|
| | | USD | USD | # | # |
| Length of coaching engagement (mainly) | 3 months or less | \$25,000 | \$150 | 9 | 12 |
| | 4 to 6 months | \$41,500 | \$220 | 10 | 13 |
| | 7 to 12 months | \$63,000 | \$280 | 13 | 16 |
| | More than 12 months | \$69,000 | \$250 | 14 | 17 |
| Duration of coaching session (mainly) | Less than 1 hour | \$45,200 | \$190 | 13 | 15 |
| | One hour | \$46,200 | \$210 | 11 | 13 |
| | More than one hour | \$49,000 | \$250 | 11 | 15 |
| Delivery methods (always/frequent) | In person | \$48,800 | \$220 | 11 | 14 |
| | Telephone | \$56,700 | \$240 | 12 | 15 |
| | Audio-visual | \$49,700 | \$220 | 11 | 15 |
| | All other | \$52,200 | \$240 | 12 | 17 |

Annual Revenue/Income from Coaching

Coach practitioners exhibit considerable diversity across a range of attributes, such as years of coaching experience, coaching specialties and number of additional services offered.

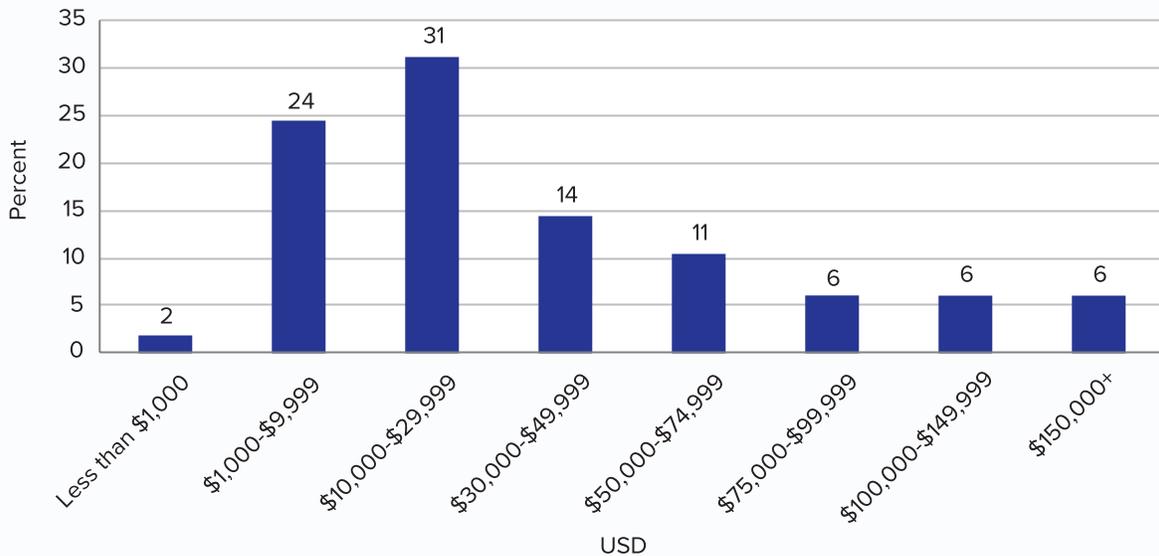
Reflecting that diversity, coach practitioners differ in the number of clients that they coach, the fees that they charge per one hour coaching session and the weekly hours that they work as a coach.

Furthermore, survey respondents were not asked to give their revenue/income from all sources and almost all coach practitioners offer additional services. Bearing that caveat in mind, it is nonetheless the case that annual revenue/income from coaching varies widely.

The distribution of annual revenue/income from coaching peaks at \$10,000–29,999 U.S. dollars (31% of coach practitioners reported revenue/income in that range). More than one in two coach practitioners (57%) reported less than \$30,000 annual revenue/income from coaching.

Reflecting the wide variations between coach practitioners in their levels of experience, main specialties, etc., the revenue/income distribution has a long “tail.” Almost one in three coach practitioners (31%) indicated that their annual revenue/income from coaching was in the range of \$30,000–\$99,999 U.S. dollars. The remaining 12% reported annual revenue/income from coaching of \$100,000 U.S. dollars and above.

Annual revenue/income from coaching: distribution



KEY POINTS SUMMARY

The following are the key points from the survey findings for the key business indicators (annual revenue/income from coaching, fee per one-hour session, clients and hours):

- On average, the more experienced coach practitioners have higher annual income/revenue from coaching. Years of experience is also positively linked to the average fee per one-hour coaching session, weekly hours and number clients.
- Coach practitioners specializing in Business coaching tend to have above-average incomes, reflecting a higher average level of fees per one-hour coaching session.
- Annual revenue/income from coaching and the remaining key business indicators are also strongly shaped by the characteristics of the client and the nature of the coach's engagement with the client.
- The position held by the coach's clients exerts an important influence on fees per one-hour session, with those coach practitioners serving executives commanding the highest hourly fees and also earning the highest annual revenue/income from coaching.
- Revenues and fees are positively related to the proportion of clients whose coaching is sponsored.

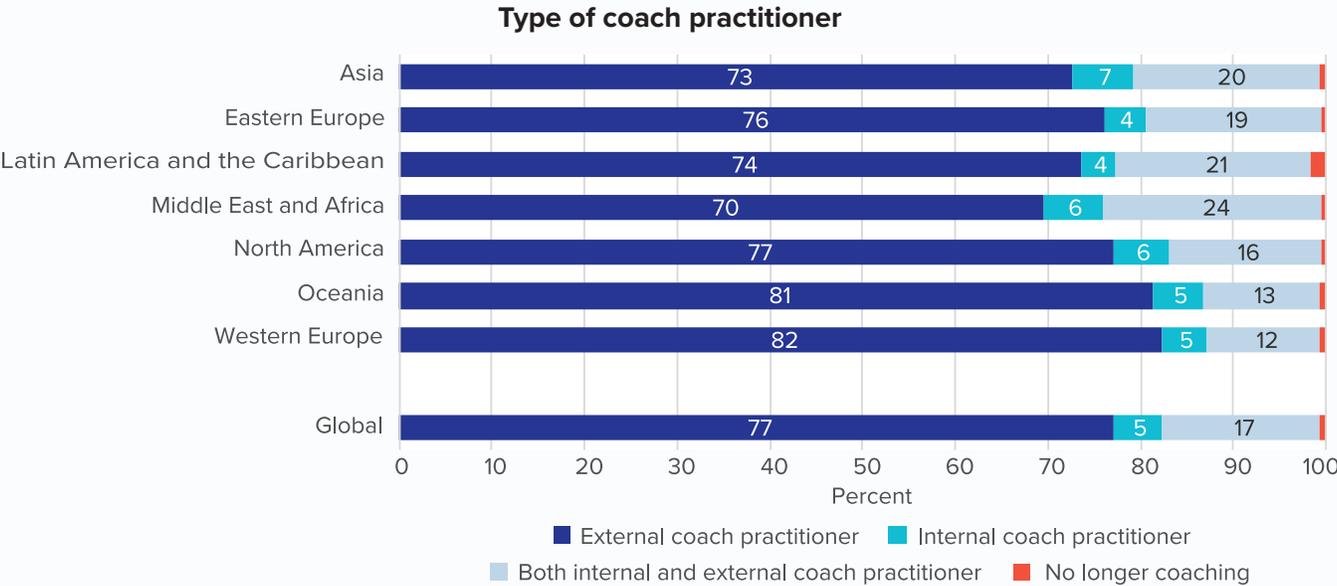


Section 4:
Coach Practitioners

INTRODUCTION

This section presents a profile of coach practitioners, under four headings:

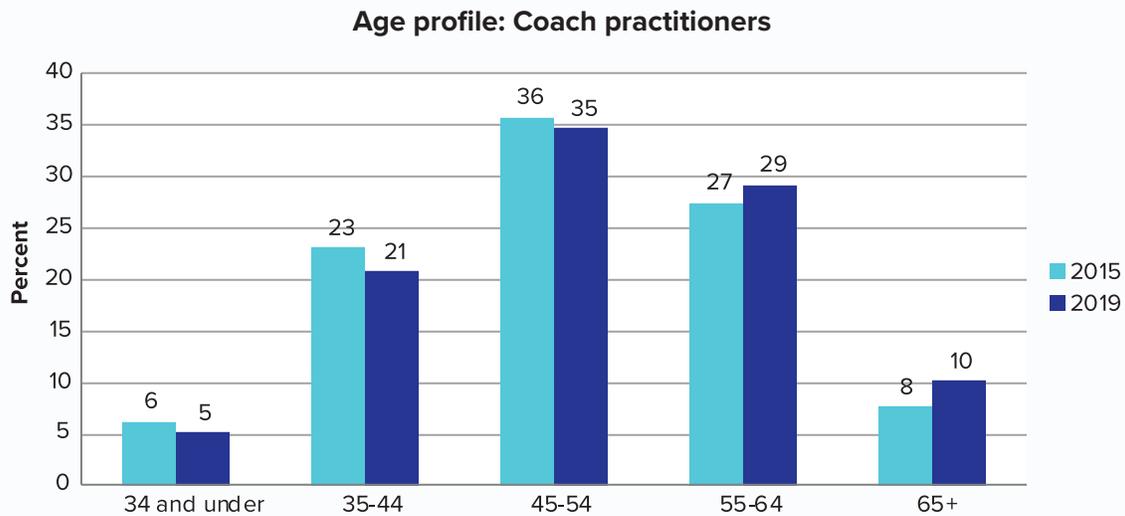
- Demographics
- Training and credentialing
- The client
- Key issues and future trends



DEMOGRAPHICS

Age

In the four-year period from 2015 to 2019, the proportion of coach practitioners aged 45 and over increased from 71 to 74%.



Generations by Year

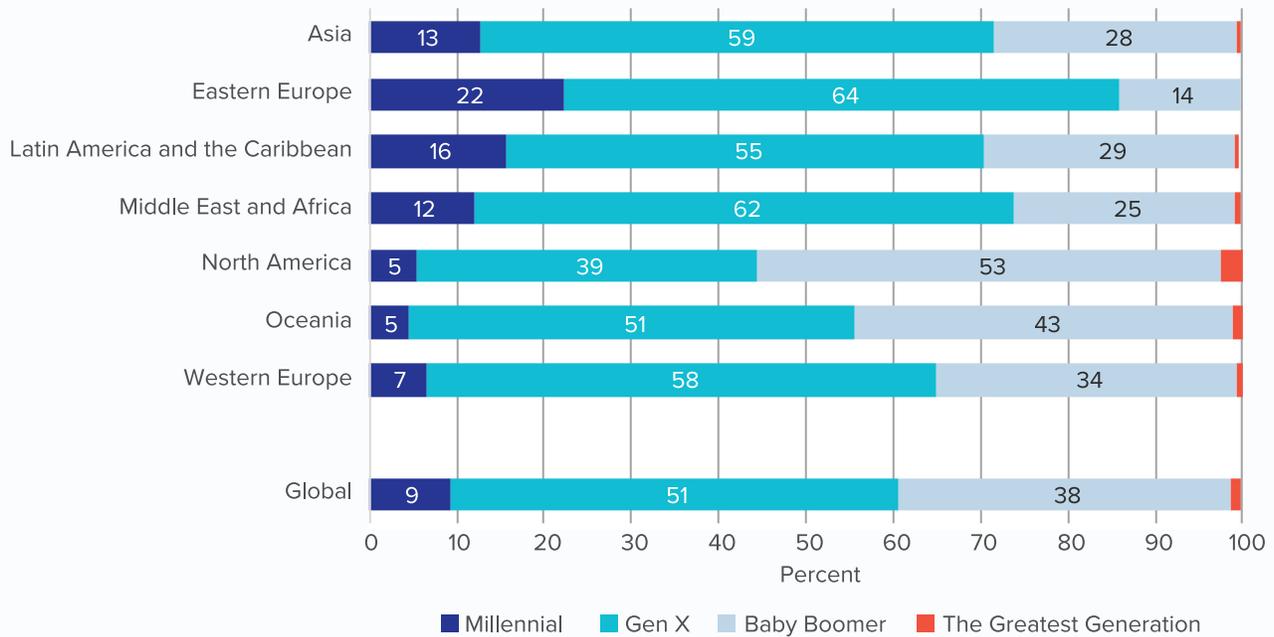
| Generations | Birth Years |
|---------------------|------------------|
| Generation Z | 1997-1999 |
| Millennials | 1982-1996 |
| Generation X | 1965-1981 |
| Baby Boomers | 1946-1964 |
| Greatest Generation | 1945 and earlier |

The shift in the age profile of coach practitioners reflects the balance between those who started coaching between 2015 and 2019 and those who stopped, for example, due to retirement. Information is not available on those who were coaching in 2015 but not in 2019. The survey results provide some insight into those who started coaching in that four-year period. In 2019, coach practitioners ages 45 and older accounted for the majority (58%) of those who have been coaching for four years or less.

Across the global regions, the age profile of coach practitioners trends younger in the emerging regions, most notably in Eastern Europe where one in two coach practitioners are aged 44 or under, compared with the global average of 52 years — by contrast, in North America, one in two coach practitioners are aged 56 years or over.

With the exception of North America, the majority of coach practitioners are in the Generation X age cohort. In North America, the majority of coach practitioners are Baby Boomers. Globally, Millennials account for just under one in 10 coach practitioners, ranging from 22% in Eastern Europe to 5% in North America.

Generation by region



Very few coach practitioners (1%) were part of the Greatest Generation. At the other end of the age spectrum, even fewer coach practitioners (0.1%) said they were part of Generation Z. In this section, therefore, furthermore detailed analysis by age group focuses primarily on the three main age generation groups within the population of coach practitioners; results for the Greatest Generation are included where the base number is sufficient.

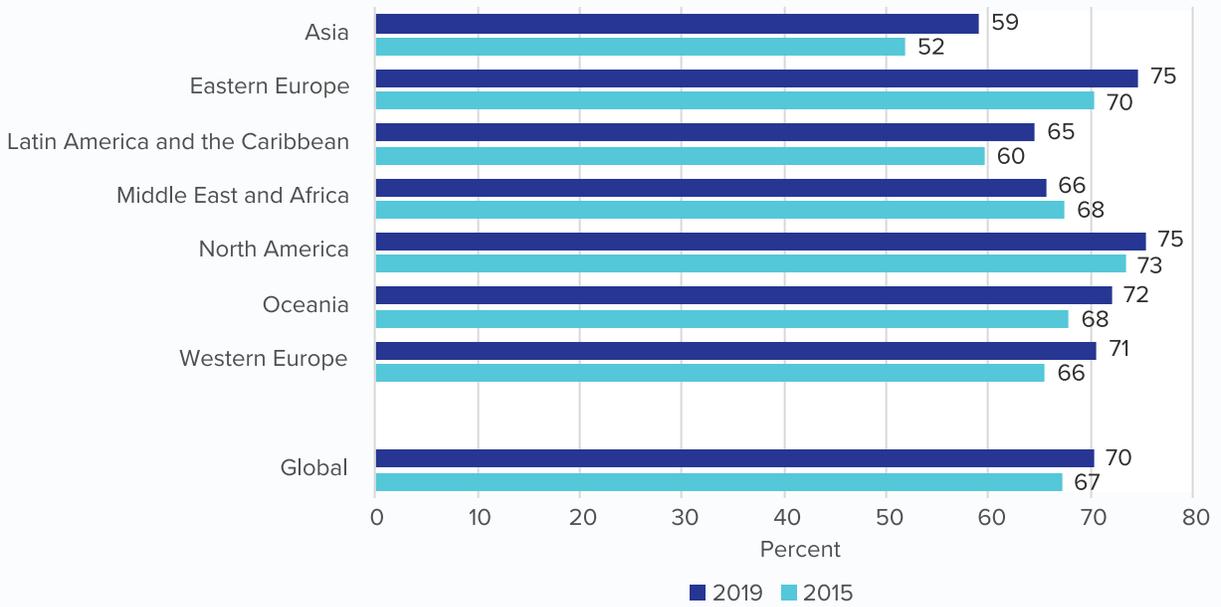
Gender

For the 2019 survey, respondents were asked to say if they consider themselves female, male or gender neutral/gender fluid. The majority of coach practitioners (70.3%) said they are female, with 29.5% male and 0.2% gender neutral/fluid. Due to the low base number reporting as gender neutral/fluid, statistical analyses of gender in this section are focused on the male/female split. That is not at all to diminish the importance of including those who consider themselves gender neutral/fluid; their views and perspectives are included in the reporting on the survey results.

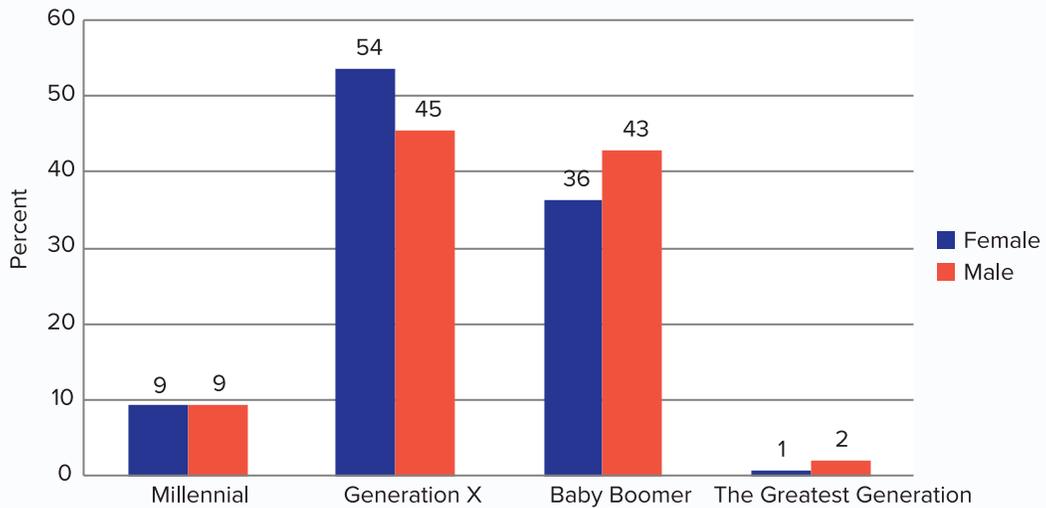
The 70% female share in 2019 represents an increase of three percentage points compared to the 2015 share (67%). That does not necessarily indicate a trend increase in the female share as previous surveys have shown a degree of fluctuation; in 2011, the female share stood at 67%, which was lower than the 69% female share reported in the first global survey of coach practitioners, undertaken in 2006.

Between 2015 and 2019, the female share rose across all regions except the Middle East and Africa. The largest increase was in Asia, up by seven percentage points from 52% in 2015 to 59% in 2019.

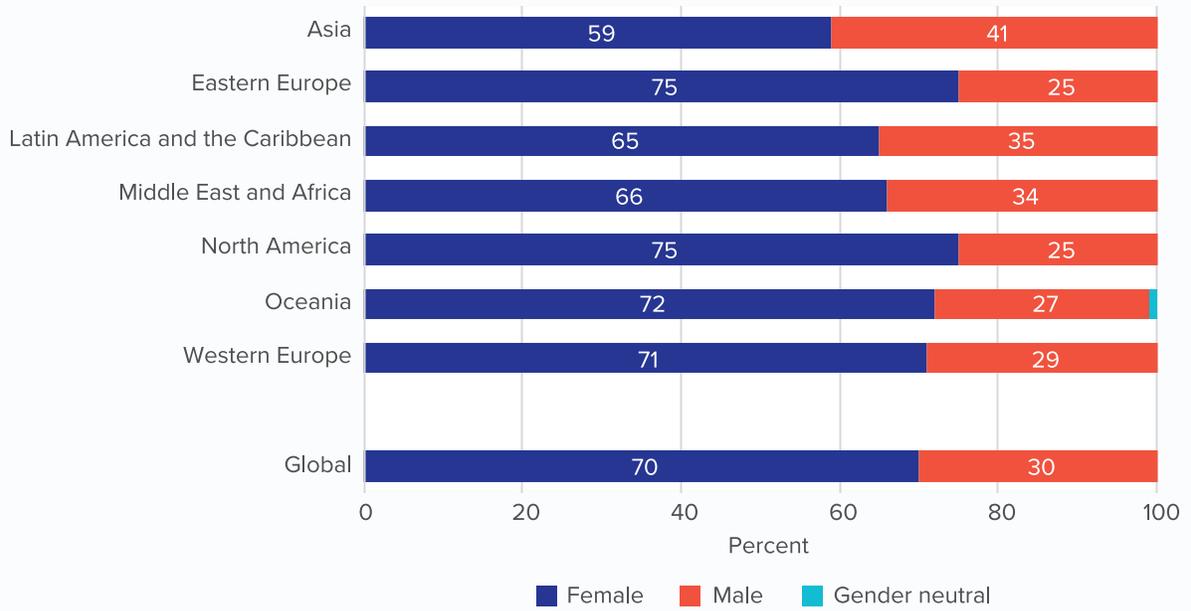
Females share of coach practitioners by region



Gender by generation



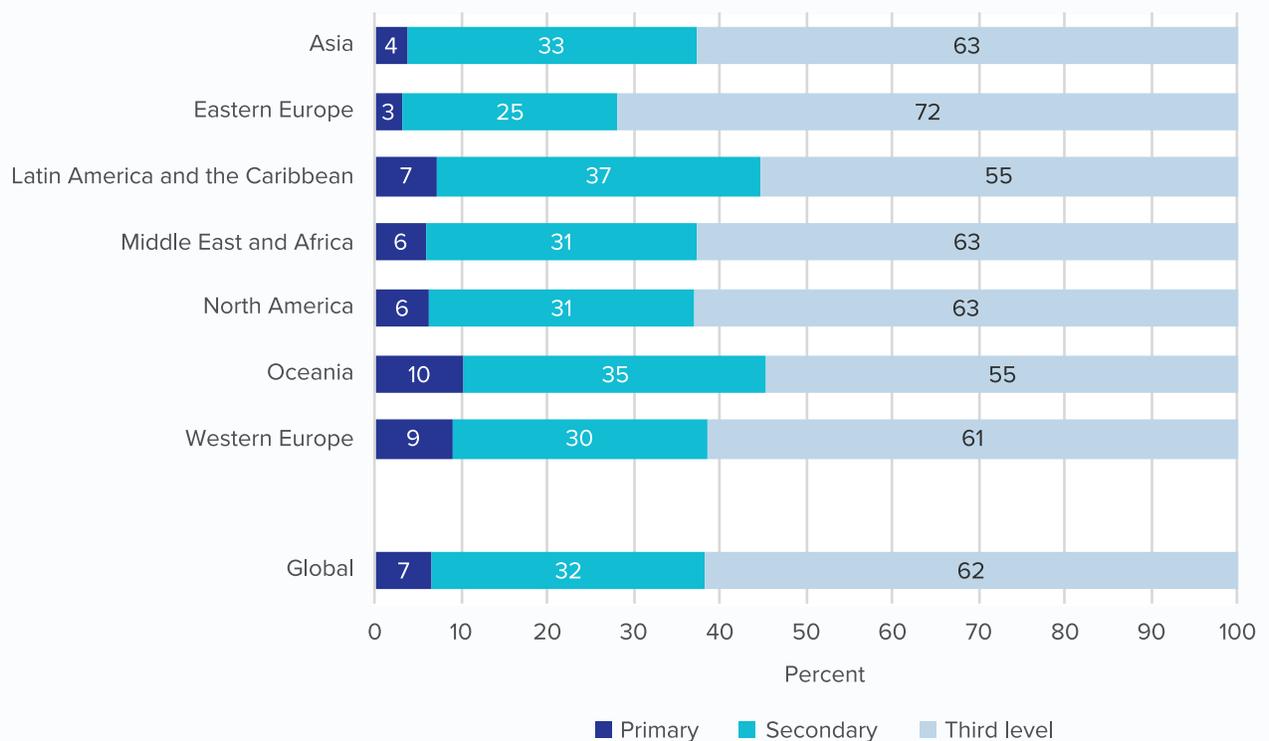
Gender by region



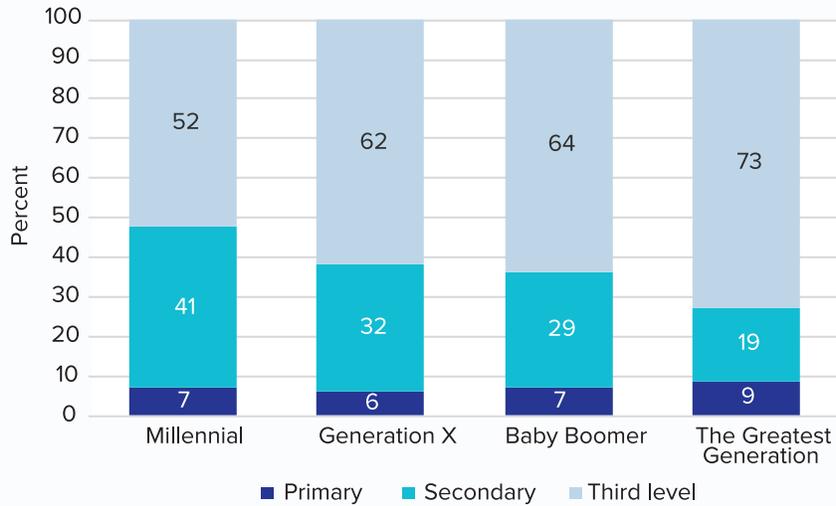
Education

The proportion of coach practitioners with a third-level qualification is highest in Eastern Europe (72%) and lowest in Oceania (55%). The regional pattern in 2019 is very similar to 2015.

Education by region



Education by generation

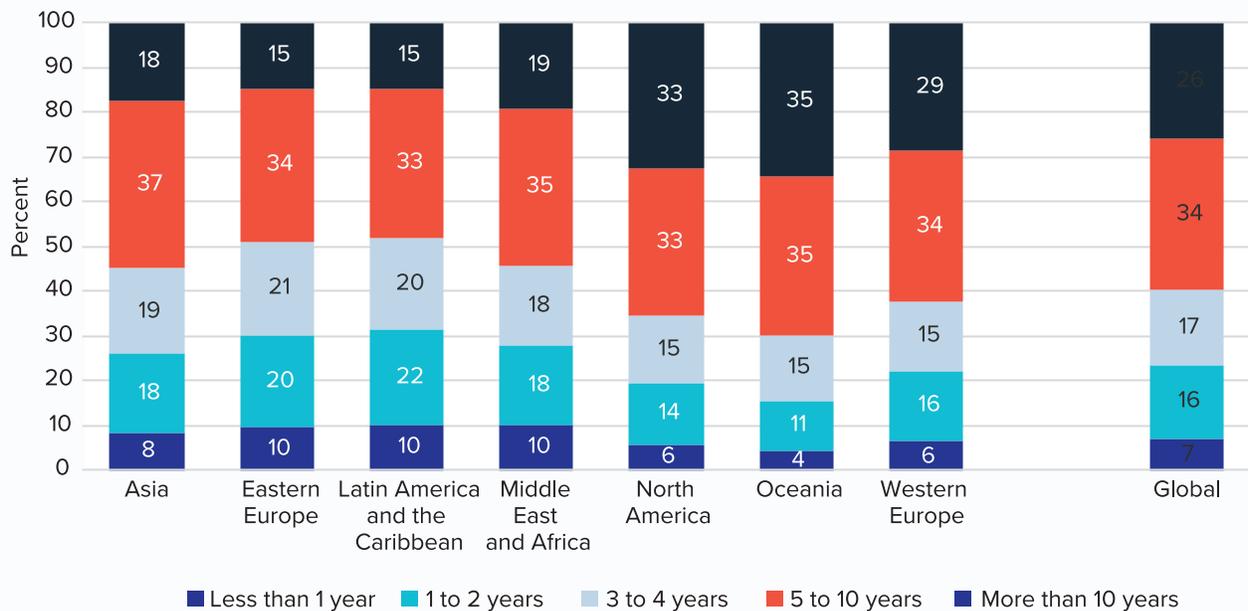


Coaching experience

The proportion of coach practitioners with five or more years' experience is highest in the regions where coaching has been established for longer, ranging from 70% in Oceania to 66% in North America and 63% in Western Europe.

By contrast, coach practitioners with less than five years' experience are more prominent in the emerging regions where coaching has been growing most quickly since 2015. They form a slight majority in both Latin America and the Caribbean (52%) and Eastern Europe (51%) and account for close to half of all coach practitioners in the Middle East and Africa (46%) and Asia (45%).

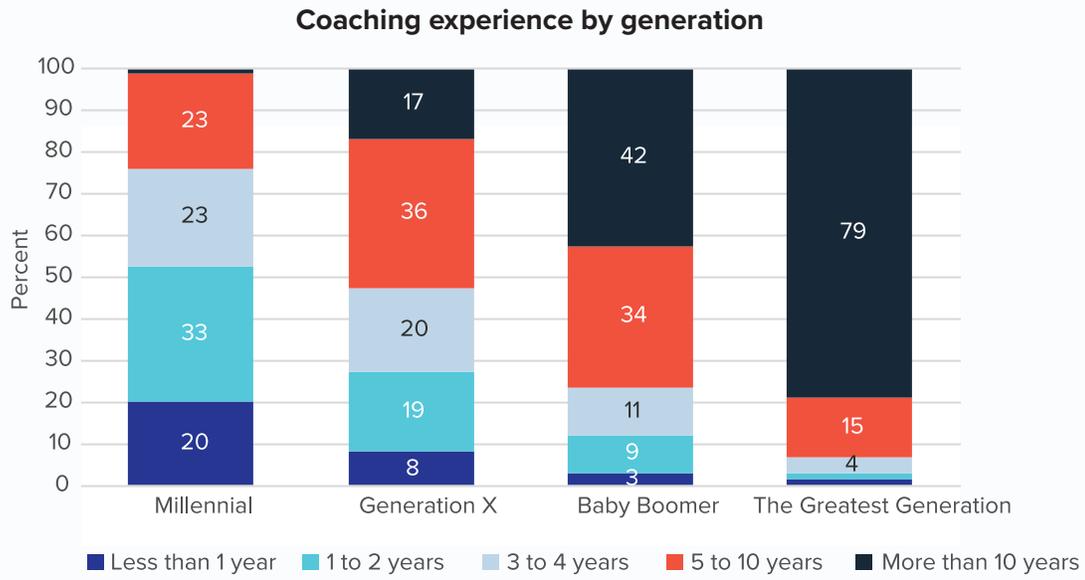
Coaching experience by region



Coaching experience is positively linked to the age of the coach practitioner.

The percentage of coach practitioners with less than five years' experience is higher in the younger age groups. More than three in four Millennials (76%) have less than five years' experience. The age gradient is steep, as a minority of Generation X coach practitioners (47%) have less than five years' experience.

More experienced coach practitioners are also more likely to hold a more advanced degree; almost two in three (65%) of those who have been coaching for five or more years compared with 57% of those with less than five years' experience.



Main Area of Coaching

Leadership was the main area of coaching most frequently mentioned in the 2019 survey (30%). This was followed by Executive Coaching (16%) and Business/Organizations (16%). Along with Small Business (3%), those areas of coaching are referred to collectively as Business Coaching throughout this report.

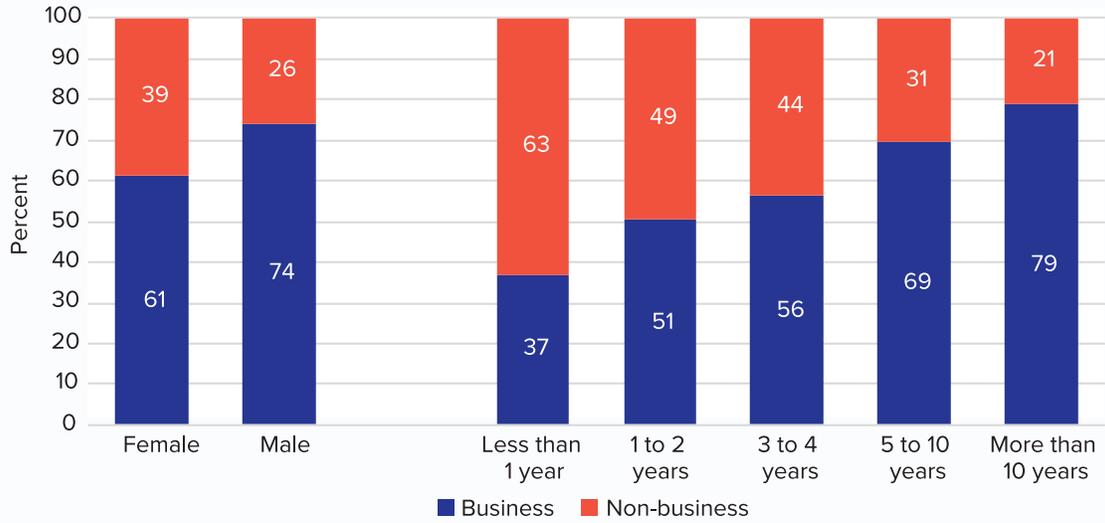
Compared with 2015, the proportion identifying Business Coaching as their main specialty increased by three percentage points, up from 62% in 2016 to 65% in 2019. The change was driven by the rise in the proportion of coach practitioners citing Leadership Coaching as their main specialty, up from 25% in 2015 to 30% in 2019.



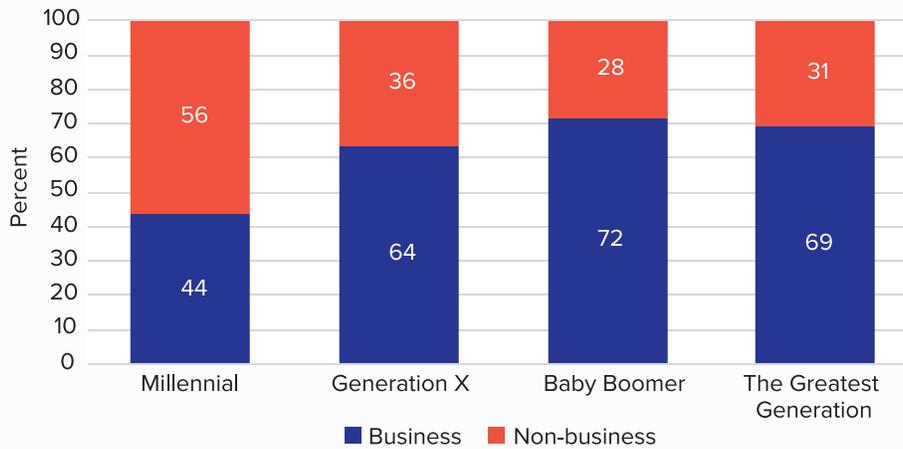
The prevalence of Business Coaching varies with gender and years of experience.

- Male coach practitioners are more likely to have a business specialty (74% compared with 61% of female coach practitioners).
- The more years of coaching experience, the higher the proportion of coach practitioners with Business Coaching as a main specialty, ranging from 37% of coach practitioners with less than one year of experience to 79% of those coaching for 10 or more years.
- The incidence of Business Coaching is also related to the age of the coach practitioner. Most notably, fewer Millennials (44%) specialize in Business Coaching compared to earlier generations.

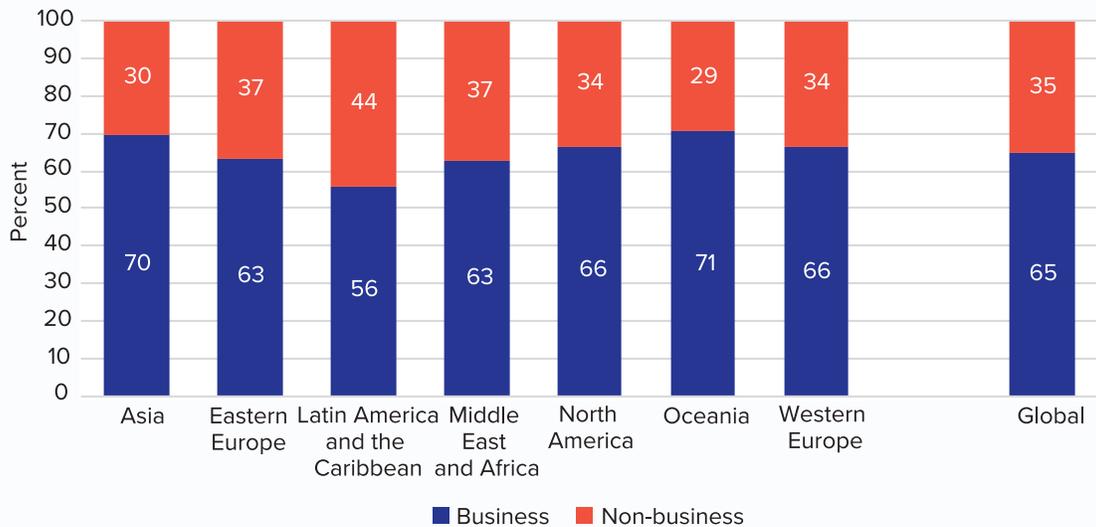
Main area of coaching by gender and experience



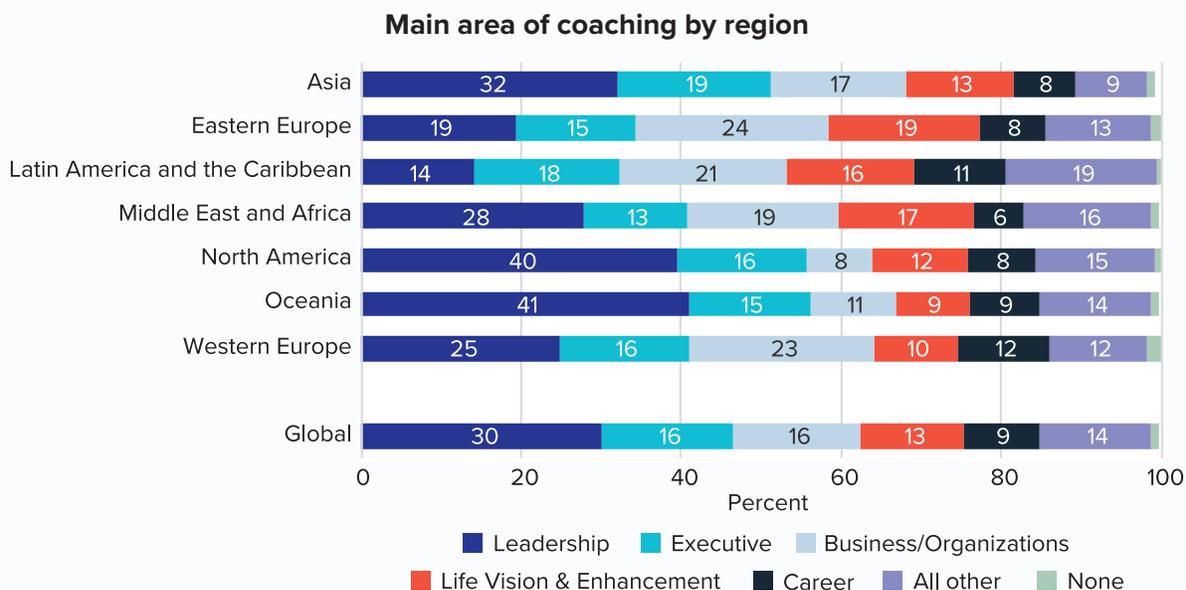
Main area of coaching by generation



Main area of coaching by region



Coaching specialties also vary regionally. In North America, 40% of coach practitioners said they mainly specialize in Leadership Coaching. By contrast, in Latin America and the Caribbean, only 14% of coach practitioners mentioned Leadership as their main area of coaching. Conversely, Business/Organization Coaching was cited by 21% of coach practitioners in Latin America and the Caribbean compared with 8% in North America and 11% in Oceania.



Percent of time spent as internal/external coach

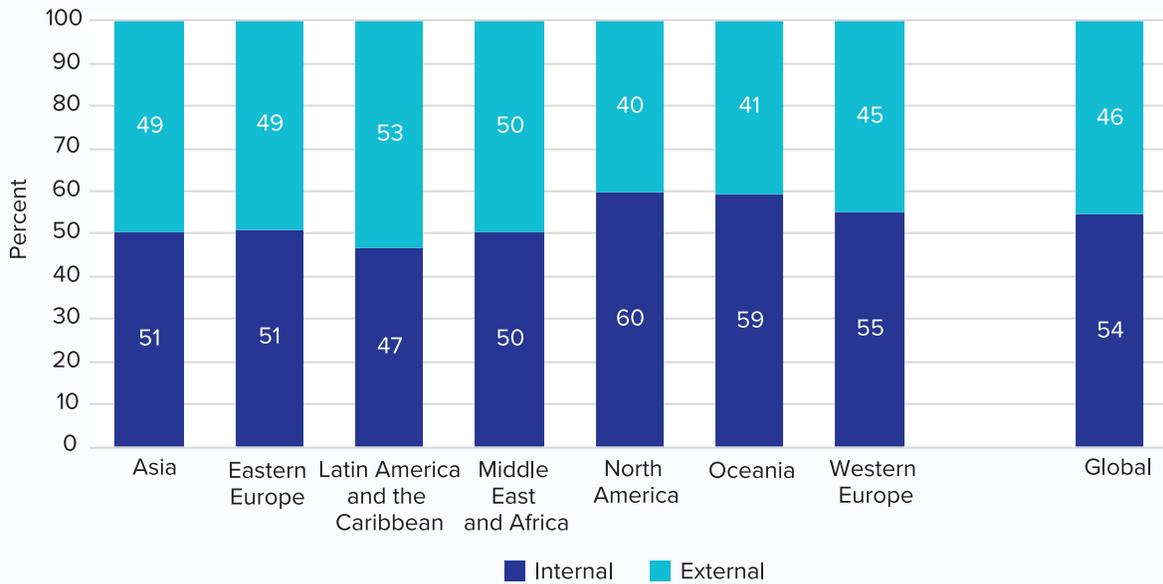
A little under one in five coach practitioners (17%) work as both an internal and external coach. On average, they devote a higher proportion of their time to their internal coaching practice (54%).

There are some regional variations in the allocation of time between internal and external coaching. In general, among those who deliver both internal and external coaching, internal coaching accounts for a higher share of coach practitioners' time in the more established regions of North America (60%), Oceania (59%) and Western Europe (55%).



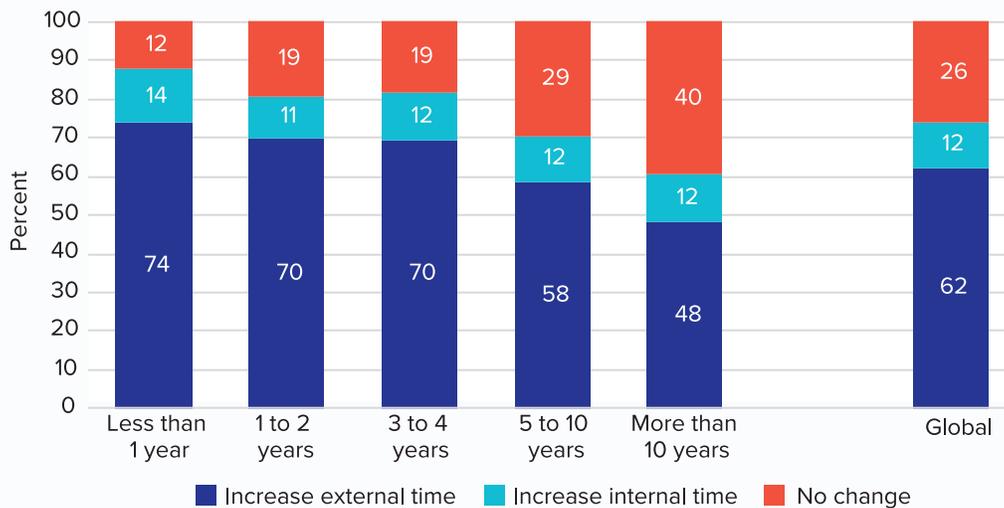
A little under one in five coach practitioners (17%) work as both an internal and external coach.

**Both internal and external coach practitioners:
Percent of time spent as internal and external coach practitioner**

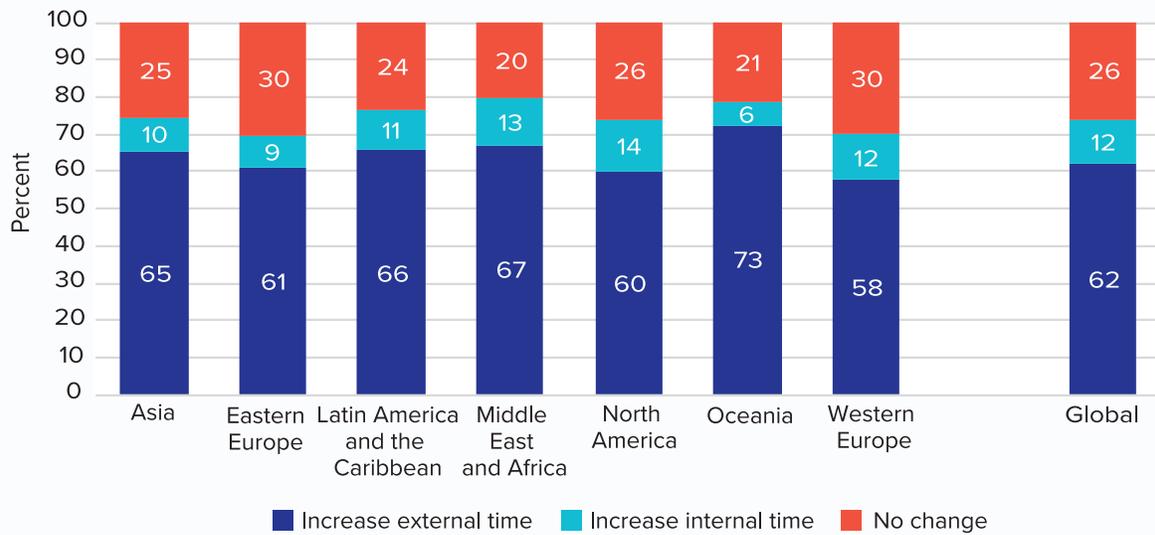


When asked about their plans for the next 12 months, the majority (62%) of those who coach both internally and externally said they intended to increase the proportion of time that they spend as an external coach.

**Coaches delivering both internal and external coaching:
Plans for next 12 months by coaching experience**



Coaches delivering both internal and external coaching: Plans for next 12 months by region

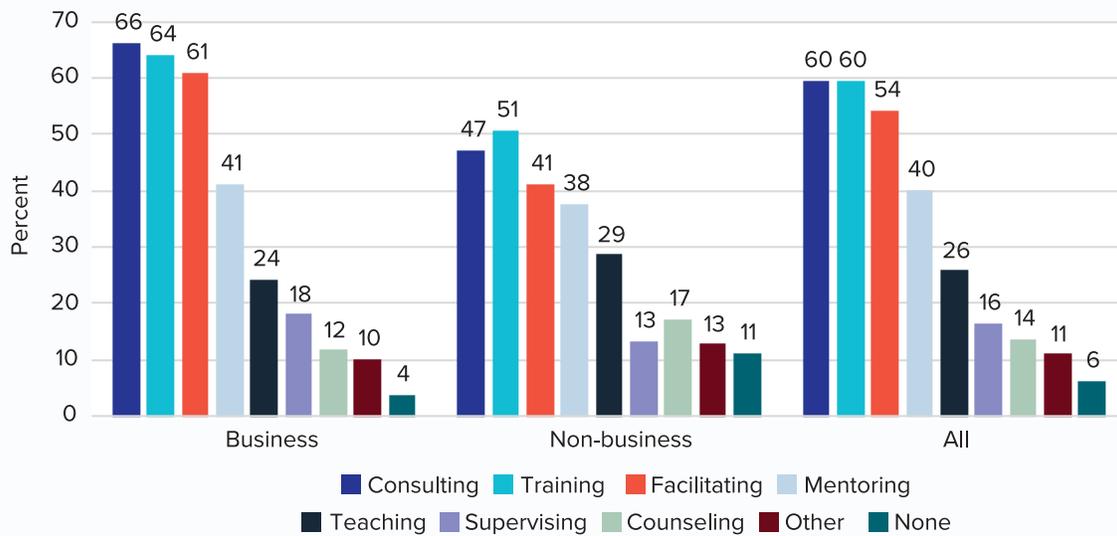


Additional services

Almost all coach practitioners (94%) offer services in addition to coaching. Most frequently, coach practitioners also offer consulting (60%), training (60%) and/or facilitation services (54%).

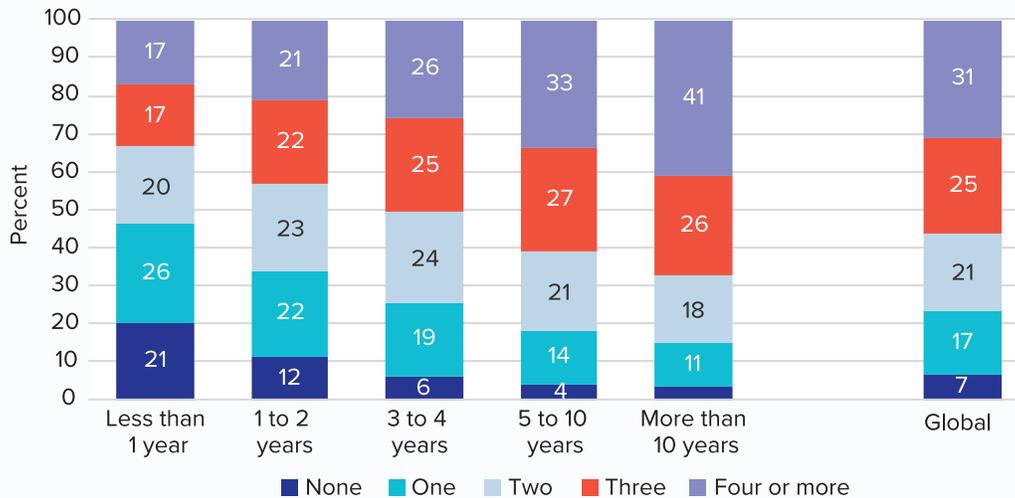
Coach practitioners whose main area of coaching is Business Coaching, on average, provide a wider range of additional services compared to those with a non-business specialty.

Additional services offered, by main coaching specialty



As their experience grows, coach practitioners accumulate a more diversified 'portfolio' of additional services. On average, 67% of coach practitioners with 10 or more years of experience offer three or more additional services, almost double the proportion of coach practitioners with less than one year of experience (34%).

Number of additional services by years of coaching experience



The average number of additional services does not vary greatly by region. However, there are some differences in the portfolio of services. For example, consulting was most often cited as an additional service by coach practitioners in North America (64%) and Latin America and the Caribbean (63%). By contrast, training received the most mentions in Western Europe (64%), Eastern Europe (68%), Middle East and Africa (61%) and Asia (65%).

Coach practitioners who said they offer services in addition to coaching were also asked how they allocate their time between coaching and the other services that they provide. On average, coaching accounts for the largest proportion of their time (44%), followed by consulting (14%), training (13%) and facilitating (10%).

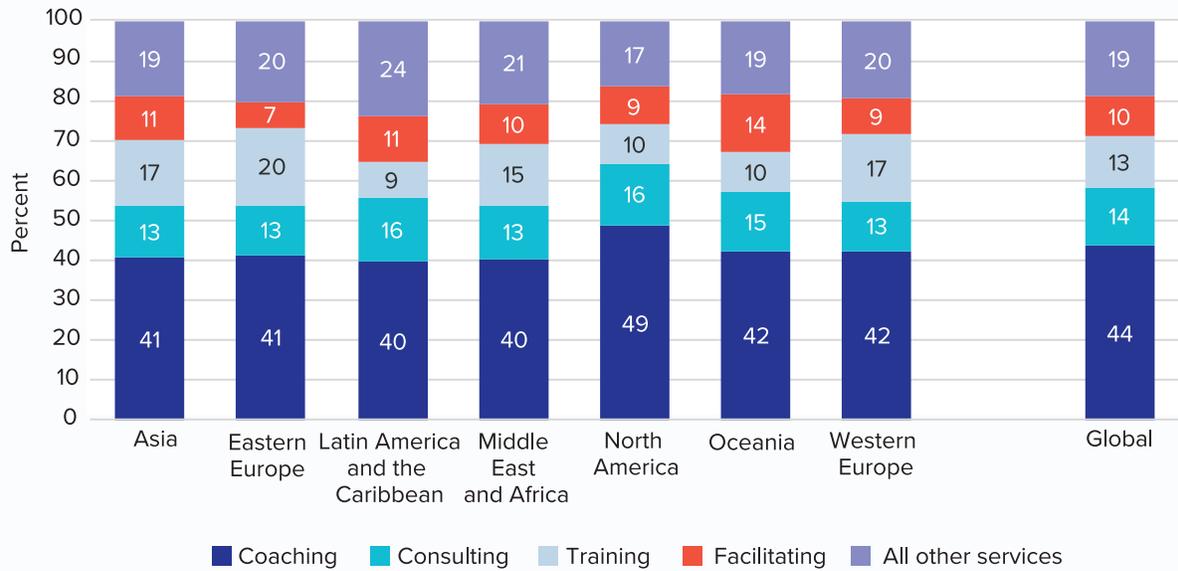
| | North America | Latin America and the Caribbean | Western Europe | Eastern Europe | Middle East and Africa | Asia | Oceania | Global |
|---------------------------------------|---------------|---------------------------------|----------------|----------------|------------------------|------------|------------|------------|
| Consulting | 64 | 63 | 51 | 55 | 53 | 54 | 58 | 59 |
| Training | 56 | 48 | 64 | 68 | 61 | 65 | 51 | 58 |
| Facilitating | 57 | 53 | 47 | 41 | 51 | 54 | 65 | 53 |
| Mentoring | 35 | 46 | 35 | 51 | 46 | 43 | 47 | 39 |
| Teaching | 29 | 37 | 19 | 24 | 19 | 25 | 16 | 26 |
| Supervising | 11 | 19 | 21 | 20 | 18 | 16 | 15 | 16 |
| Counseling | 8 | 21 | 20 | 16 | 18 | 14 | 7 | 14 |
| Other | 11 | 12 | 12 | 8 | 11 | 7 | 14 | 11 |
| None | 8 | 6 | 7 | 7 | 5 | 5 | 7 | 7 |
| Average number of additional services | 2.7 | 3.0 | 2.7 | 2.8 | 2.8 | 2.8 | 2.7 | 2.8 |

On average, coach practitioners offer almost three (2.8) services in addition to coaching. That is unchanged from 2015 (also 2.8).

Coach practitioners mainly specializing in business coaching offer three additional services, on average, compared with 2.5 by coach practitioners with a non-business specialty.

The average number of additional services does not vary greatly by region, ranging from 3 in Latin America and the Caribbean to 2.7 in North America, Western Europe and Oceania.

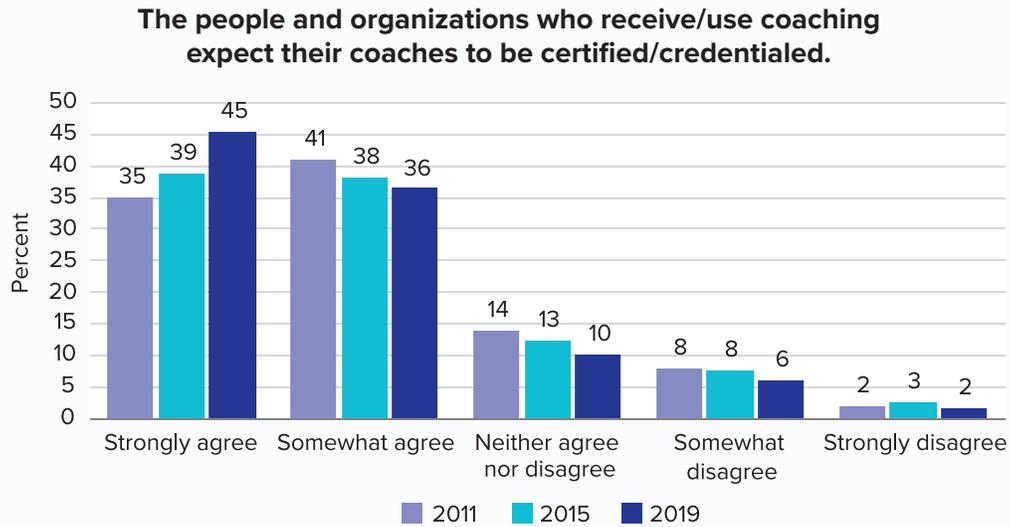
Proportion of time allocated to services offered (coaches with services in addition to coaching)



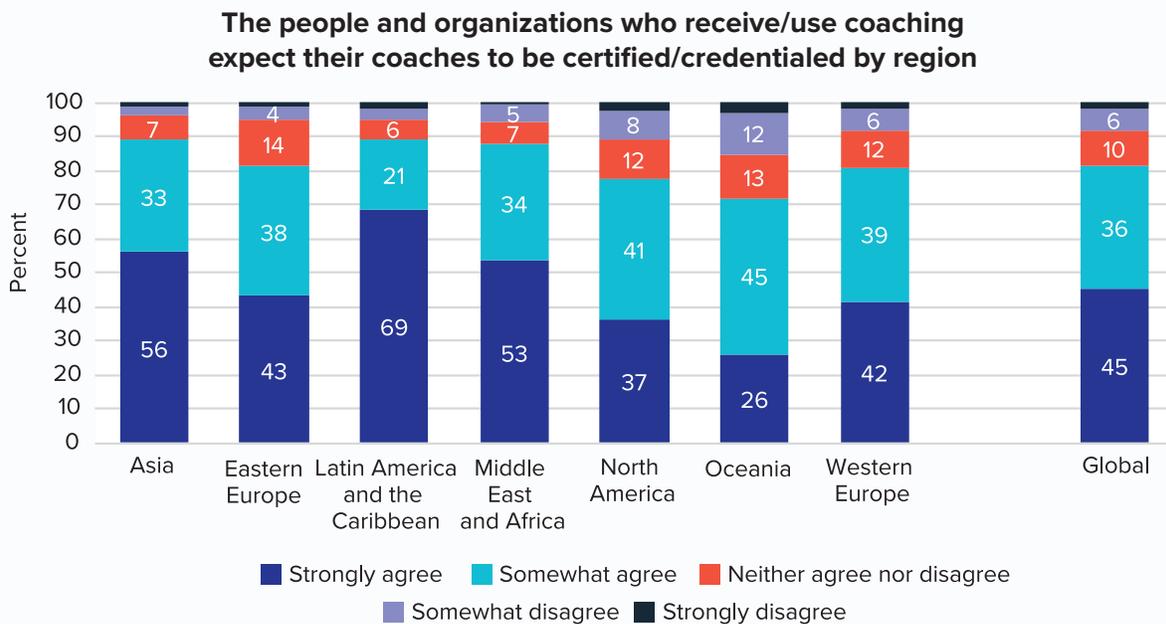
TRAINING AND CREDENTIALING

Client expectations

Coach practitioners are increasingly likely to agree that their clients expect coach practitioners to be certified/credentialed.



Coach practitioners in emerging regions were more likely to strongly agree that clients expect coach practitioners to be certified/credentialed, led by Latin America and the Caribbean (69%), Asia (56%), and the Middle East and Africa (53%).



The proportion of strong agreement was above average among coach practitioners:

- Working both as internal and external coach practitioners (52%)
- With 200 hours or more of coach-specific training (49%)
- With less than one year of coaching experience (55%) or one to two years (52%)
- Holding a coaching certification/credential (48%)

Coach-specific training

Nearly all coach practitioners (99%) report that they have completed some coach-specific training. Increasingly, that is through programs accredited/approved by a professional coaching organization.

Receipt of coach-specific training

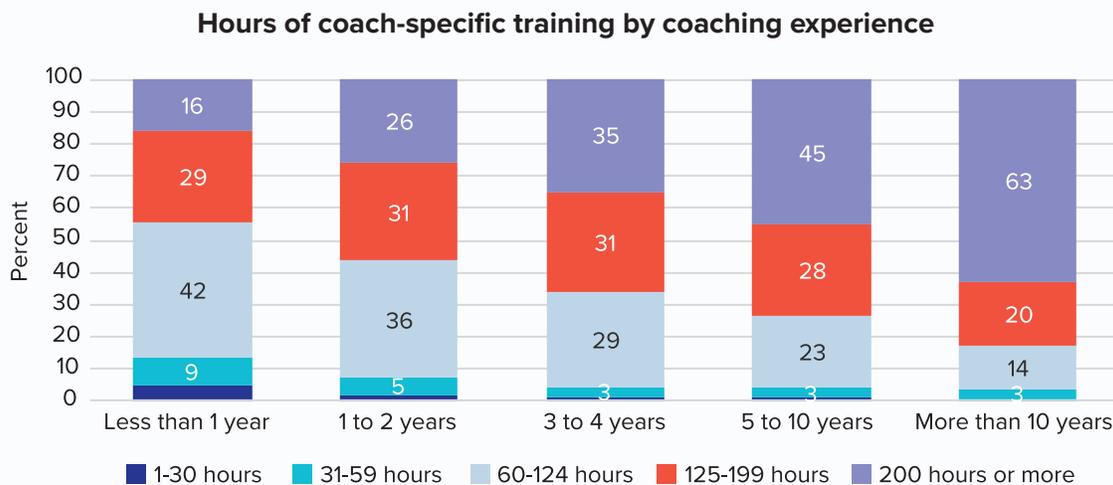
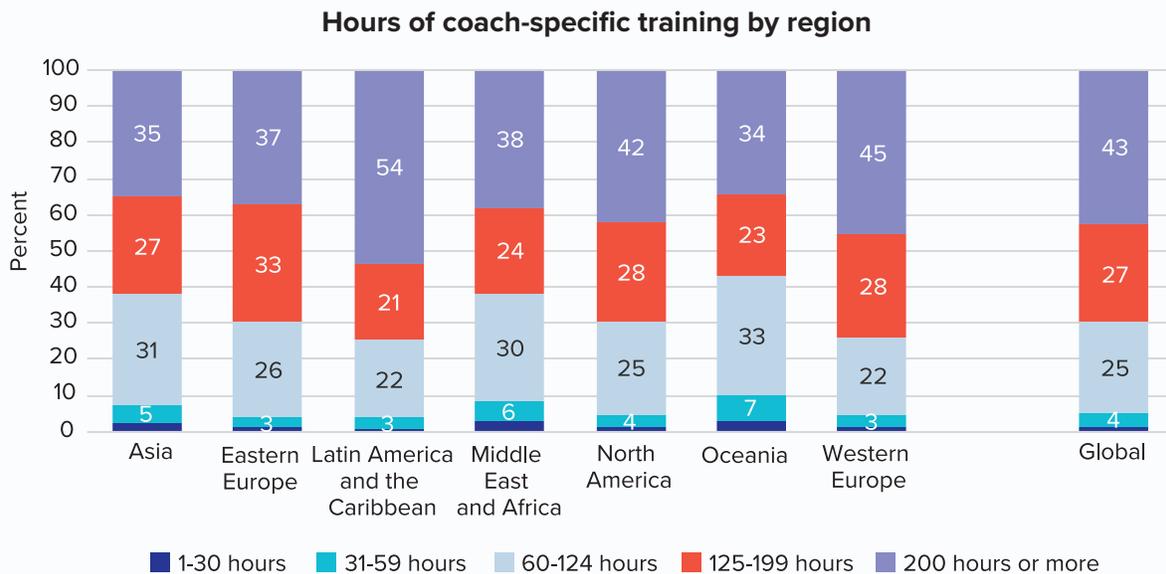


Eighty-one percent of coach practitioners agree or strongly agree that clients expect their coaches to be certified/credentialed.

Hours of coach-specific training

Among those receiving coach-specific training, the vast majority (95%) said they had completed 60 or more hours, up from 93% in 2015.

The proportion of coach practitioners with 200 or more hours of training varies sharply by region, from 54% in Latin America and the Caribbean to 34% in Oceania.



Other attributes predicting above-average receipt of 200 plus hours of training include:

- Type of coach practitioner – almost one in two external coach practitioners (45%) said they have 200+ hours of training compared with 38% of those who practice both internal and external coaching and 26% of internal coach practitioners.
- Active clients – 45% of coach practitioners with active clients versus 28% with no active clients when surveyed.
- Certification/credential – 47% of those with certifications/credentials from a coaching body compared with 31% without such a certification/credential.

Membership in coaching organizations

Membership in coaching organizations continues to increase. More than eight in 10 coach practitioners (82%) said they are a member of one or more coaching organizations, up from 79% in 2015 and 77% in 2011.

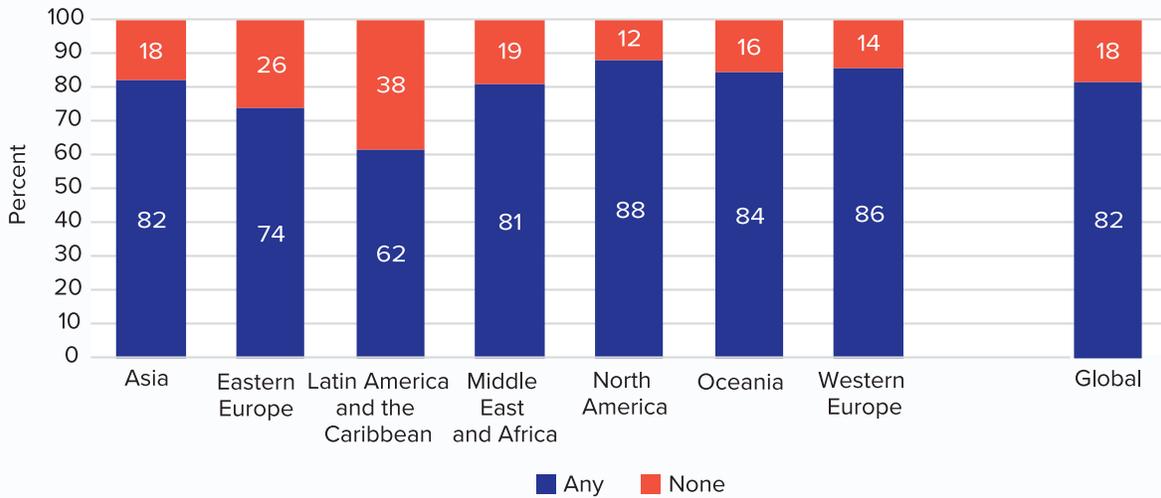
Almost three in four respondents (74%) said they are an ICF member. As outlined in the Technical Appendix, the ICF Member database was the primary means of contacting potential survey respondents. The ICF share of survey respondents reflects that element of the survey methodology.



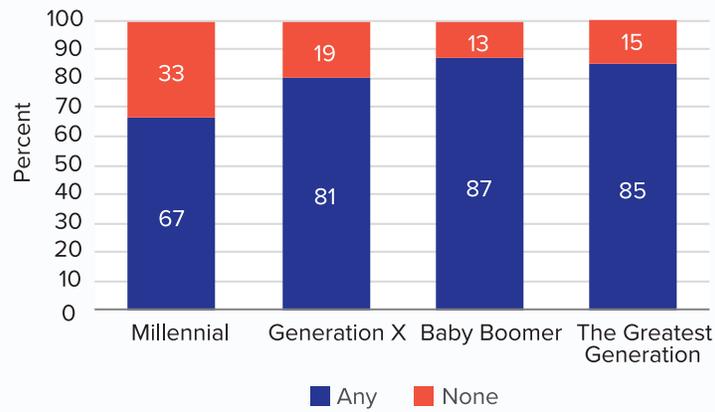
Membership in any coaching organization varies along a number of dimensions:

- **Region** – from 88% in North America to 62% in Latin America and the Caribbean.
- **Age** – 67% of Millennials, 81% of Generation X, 87% of Baby Boomers and 85% of the Greatest Generation.
- **Coaching experience** – from 66% among those with no coaching experience to 88% of those coaching with 10 or more years.
- **Currently with active clients** – 83%, versus 69% among those who do not currently have active clients.
- **View of coaching** – Practitioners who view coaching as a skillset are less likely to have a membership (75%) compared with those who view coaching as an industry (83%) or a profession (84%).

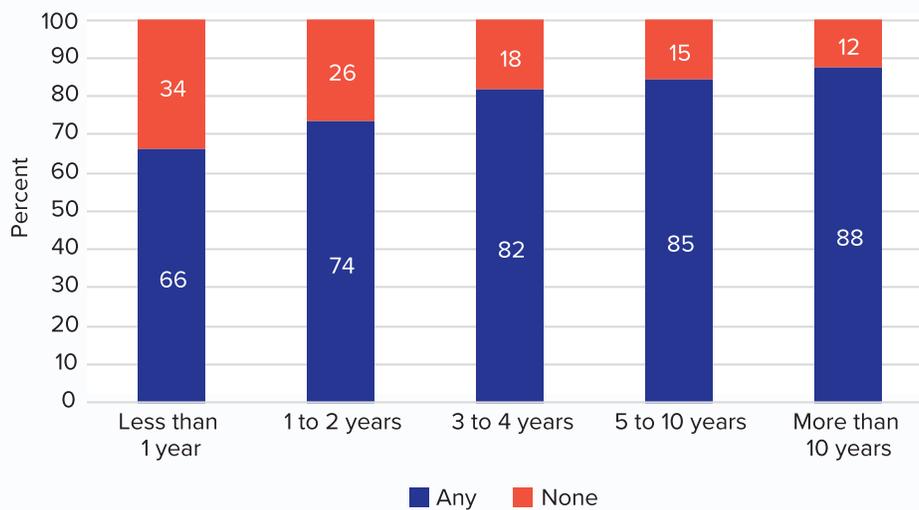
Membership in coaching organizations by region



Membership in coaching organizations by generation

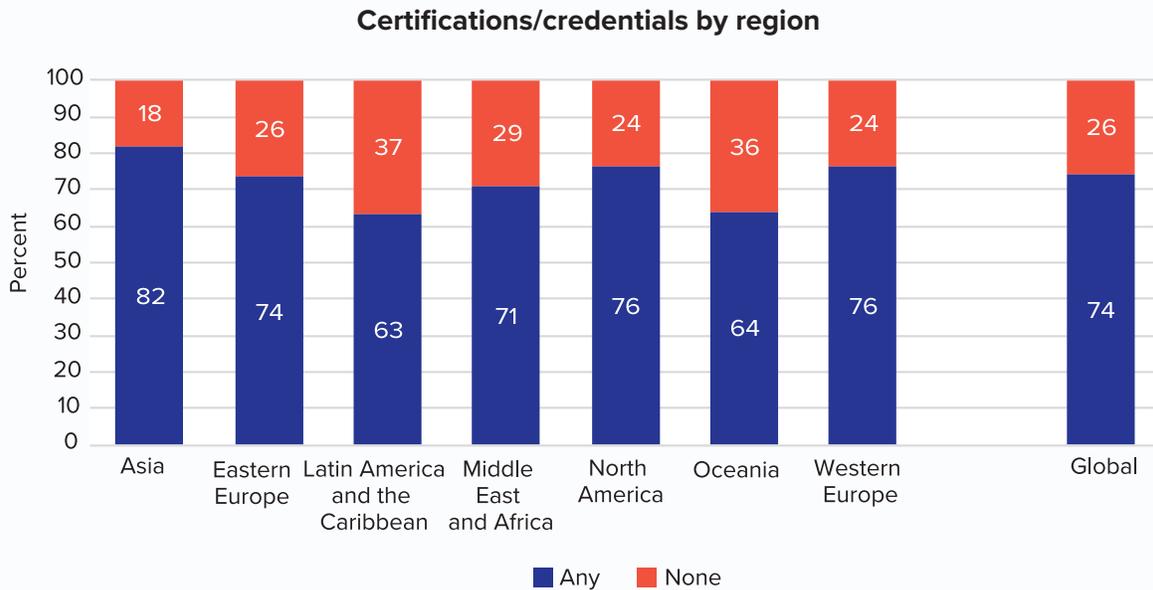
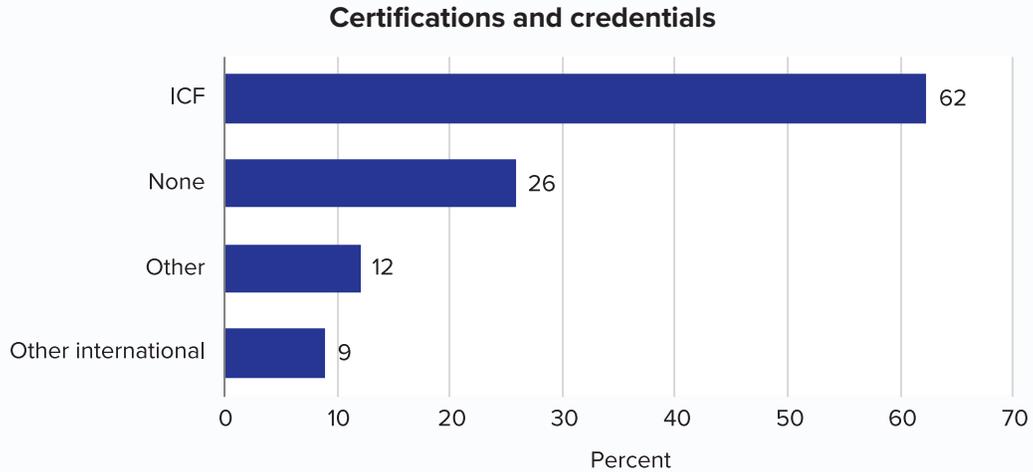


Membership in coaching organizations by of coaching experience

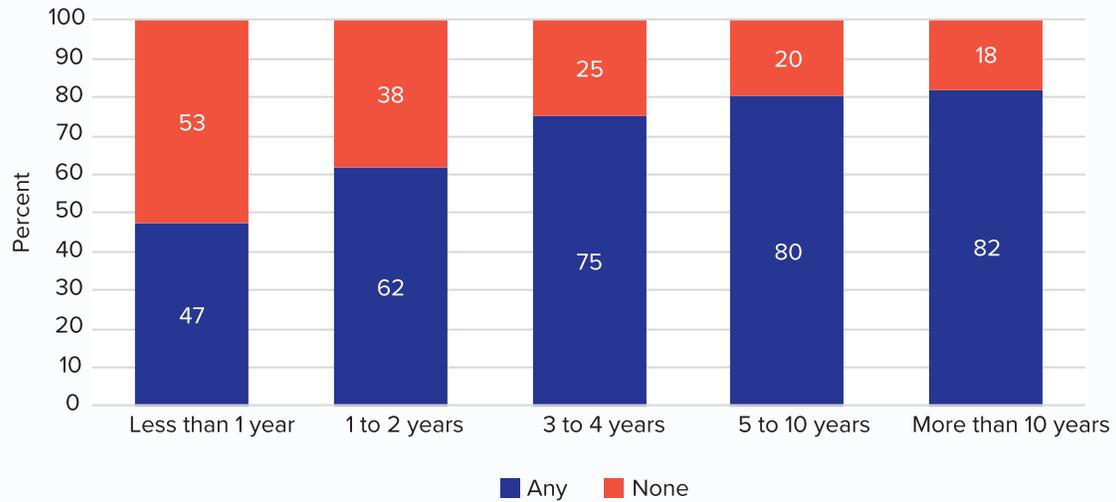


Certifications/credentials from coaching organizations

An increasing proportion of coach practitioners say they currently hold a certification/credential from a coaching organization. In the 2019 survey, 74% said they are certified/credentialed, up from 69% in 2015 and 51% in 2011.



Certifications/credentials by coaching experience



The proportion of coach practitioners with one or more certifications/credentials varies by region, from 82% in Asia to 63% in Latin America and the Caribbean.

Other factors linked to holding certifications/credentials include:

- **Active coach practitioners** – 76% of those currently with active clients versus 60% of those with no currently active clients
- **Generation** – Millennials are less likely to hold a certification/credential (62% compared to around three in four among each of the older age generation groups)
- **Coaching experience** – The proportion saying they hold a certification/credential is strongly and positively linked to years coaching, from fewer than one in two (47%) of those with less than one years' experience to 82% of coach practitioners with 10 plus years' experience
- **Coaching specialty** – Coach practitioners with a business specialty (80%) are more likely to hold a certification/credential than those with a non-business specialty (69%)
- **View of coaching** – Coach practitioners who view coaching as an industry (77%) or profession (76%) are more likely to hold a certification/credential than those who view coaching as a skillset (68%)

COACHING CLIENTS

Position Held by Clients

The overall mix of clients served by coach practitioners has remained broadly unchanged since 2015. A little over one in two coach practitioners said their clients are mostly managers (27%) or executives (25%); the combined total of 52% is identical to the position in 2015. Similarly, the proportion coaching personal clients was unchanged at 19%.



The mix of clients varies with coach practitioners' attributes, including the region in which they live, their main area of coaching, years of experience, age, gender and whether they work as an external or internal coach practitioner.

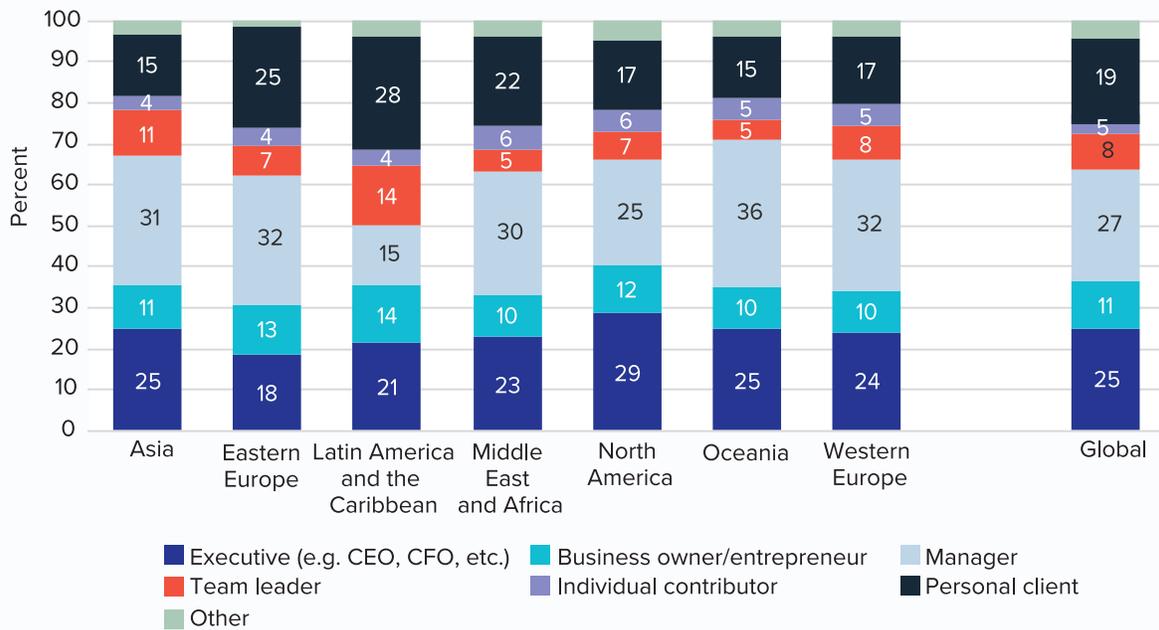
Coach practitioners in emerging regions tend to have a higher share of personal clients (28% in Latin America and the Caribbean, 25% in Eastern Europe and 22% in the Middle East and Africa).

Personal clients account for a smaller share of the client mix in North America (17%), Western Europe (17%) and Oceania (15%). In those regions, coach practitioners are more likely to have executive clients.



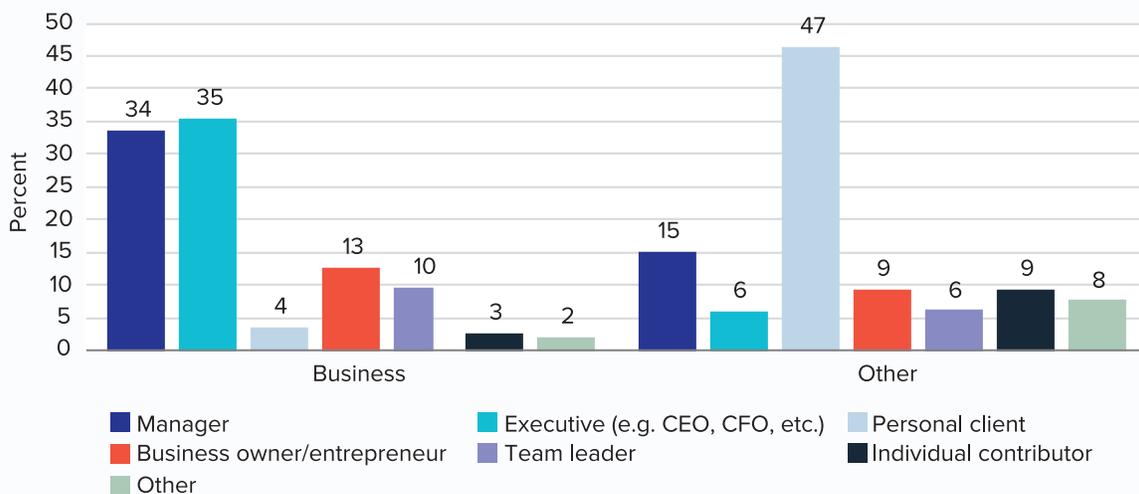
Coach practitioners in emerging regions tend to have a higher share of personal clients.

Position held by majority of clients, by region



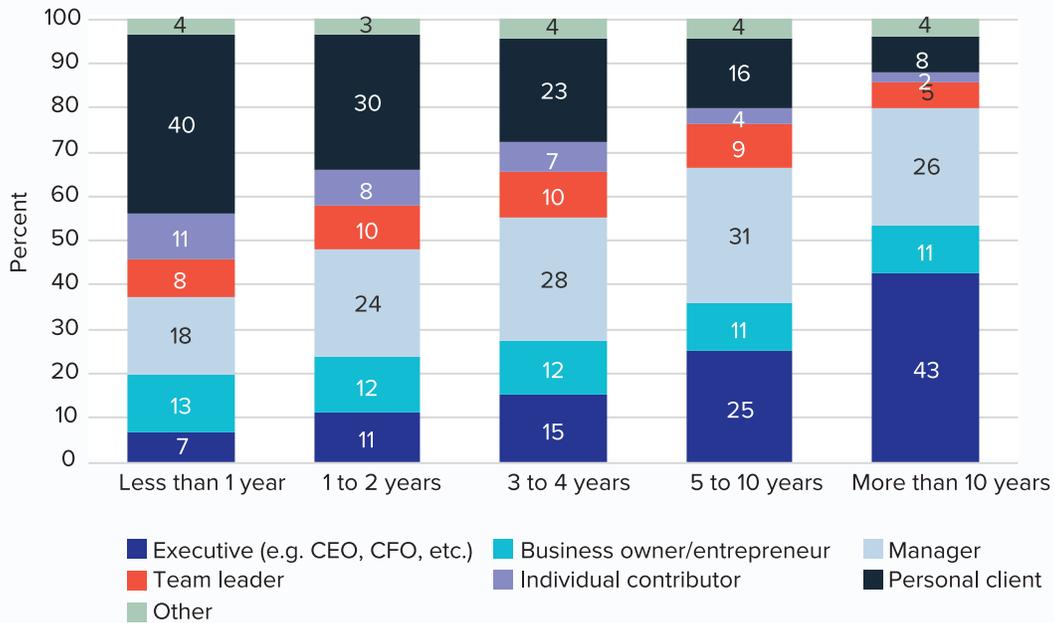
The client profile is strongly linked to coach practitioners' main area of coaching. Coach practitioners with a business specialty mostly serve executives (35%) or managers (34%). By contrast, almost one in two coach practitioners with a non-business specialty rely on personal clients (47%).

Position held by majority of clients, by business and other coaching specialty



The mix of clients coached is also strongly shaped by the coach practitioner's years of experience. The greater the number of years coaching, the more likely is the coach to have a majority of clients in executive or manager positions. The fewer the number of years coaching, the more likely the coach is to have a majority of personal clients.

Position held by majority of clients, by coaching experience



Other factors influencing the mix of client positions include:

- **Gender** – Male coach practitioners are more likely to have executives as their majority client type (30% compared to 23% of females). Female coach practitioners are more reliant on personal clients (21% compared to 14% of males).
- **Generation of Coach Practitioners** – The proportion of clients in executive positions ranges from 7% among Millennials to 21% for Generation X and rising to 35% among Baby Boomers.

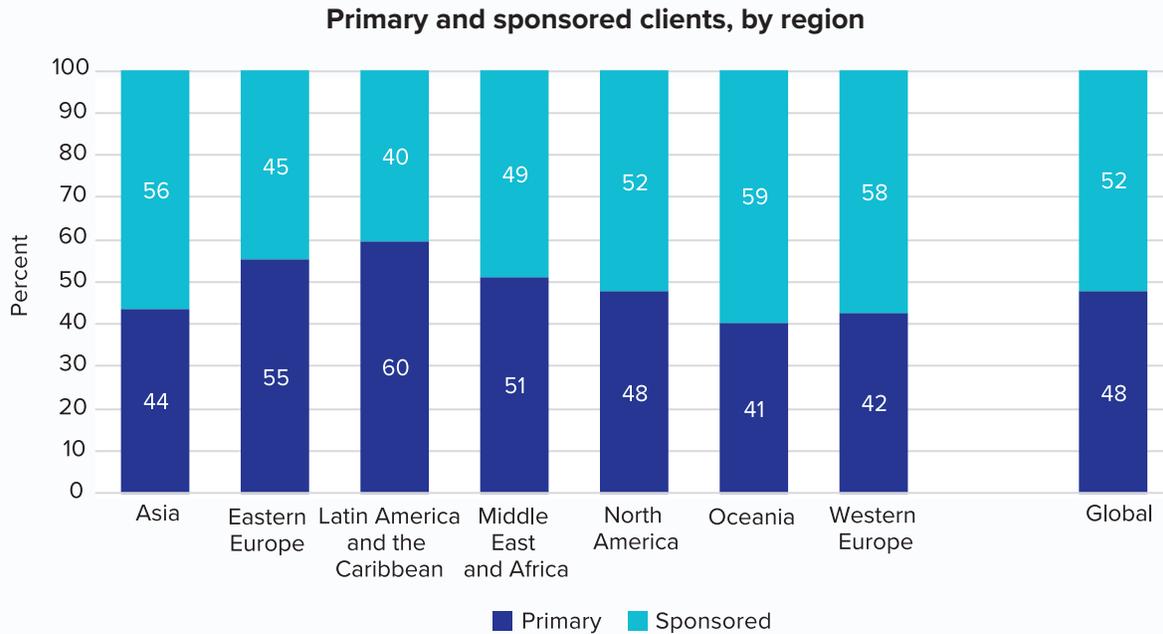


Male coach practitioners are more likely to have executives as their majority client type (30% compared to 23% of females). Female coach practitioners are more reliant on personal clients (21% compared to 14% of males).

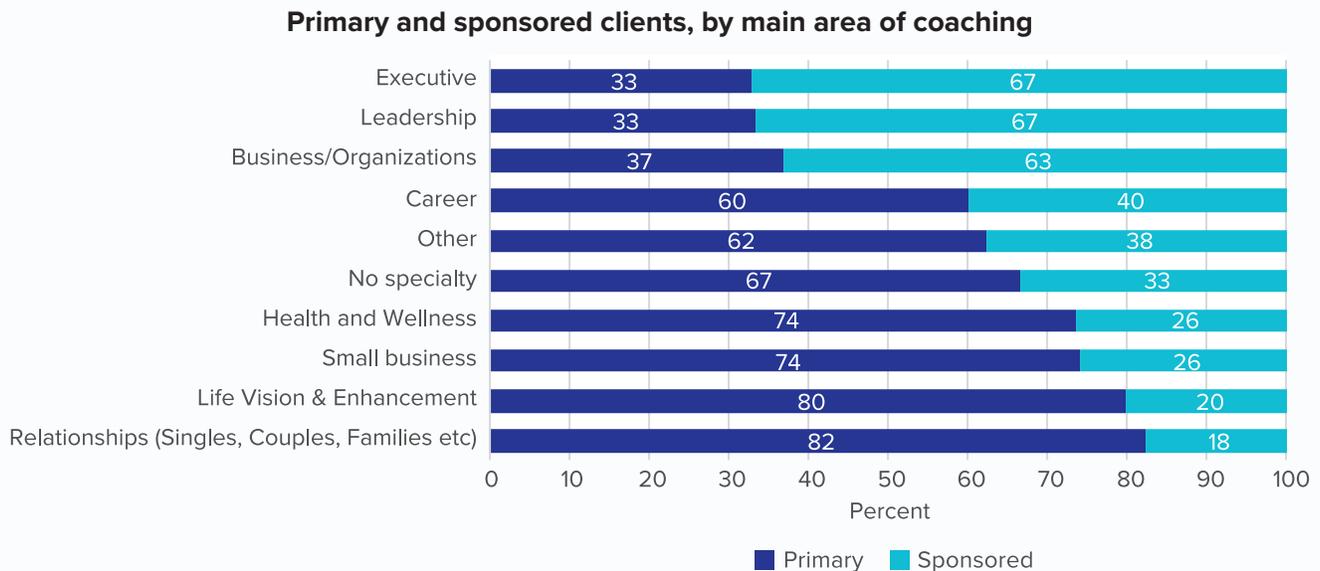
Primary and sponsored clients

Coach practitioners were asked to indicate what proportion of their clients pay for their own coaching (primary clients) and what proportion have their coaching paid for by a third party (sponsored clients).

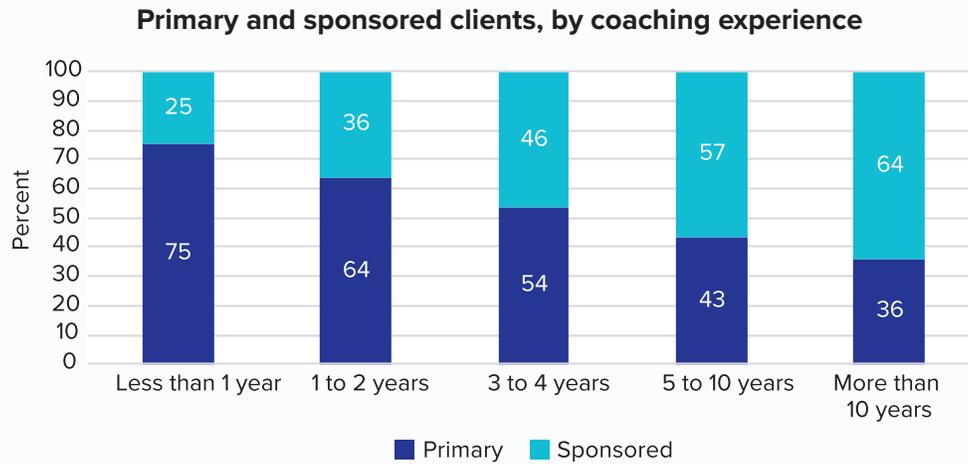
On average, coach practitioners said that 52% of their clients are sponsored and 48% are primary clients. The overall split between primary and sponsored is very similar to the position in 2015 (53% sponsored) and 2011 (51% sponsored).



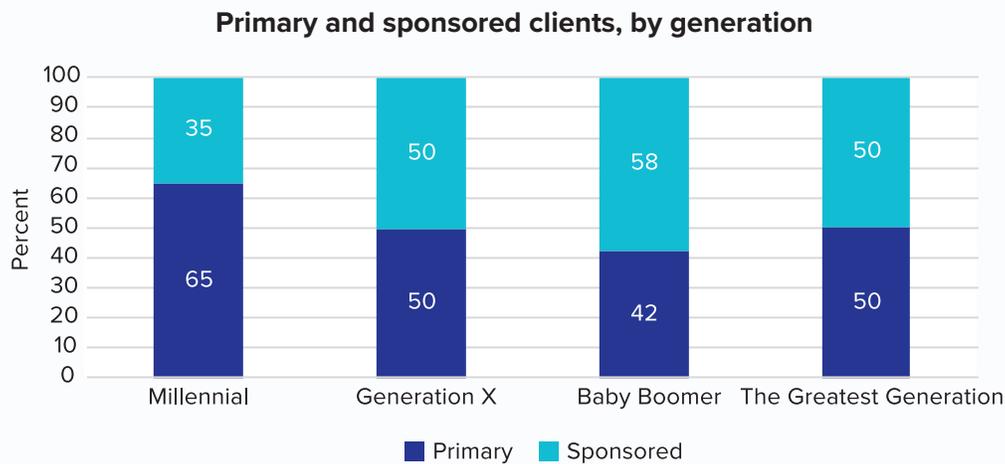
The split between primary and sponsored clients is also strongly linked to their main area of coaching. The proportion of clients who are sponsored is highest among coach practitioners whose main area of coaching is executive (67%), leadership (67%) or business/organizations. One of the four business specialties have 64% sponsored clients versus 29% for the non-business specialties.



The split between primary and sponsored clients is strongly related to the number of years coaching. The sponsored share ranges from 25% among coach practitioners with less than one year of experience to 64% for coach practitioners with 10 plus years of experience.



Reflecting the linkage with years of experience, the primary/sponsored split also varies with the age of the coach. In particular, when compared with the other age generation groups, Millennials have an above-average share of primary clients (65%) and a lower than average share of sponsored clients (35%).

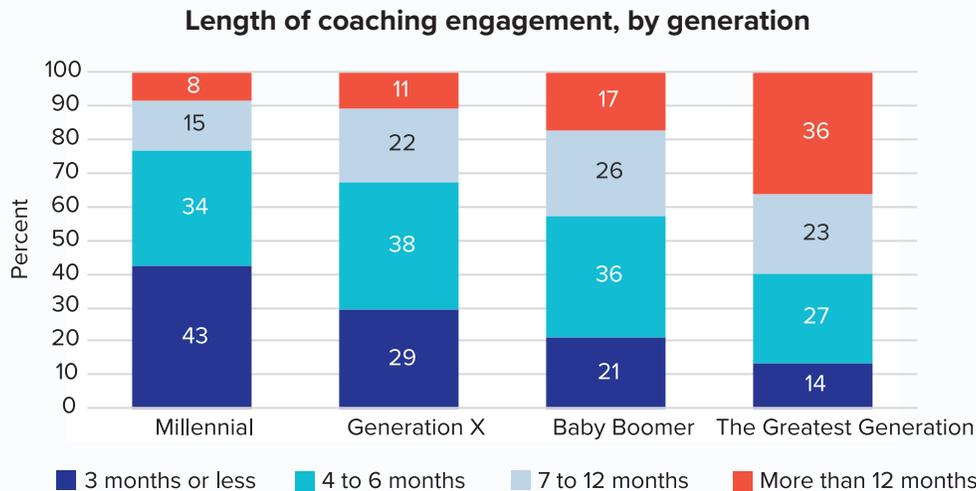
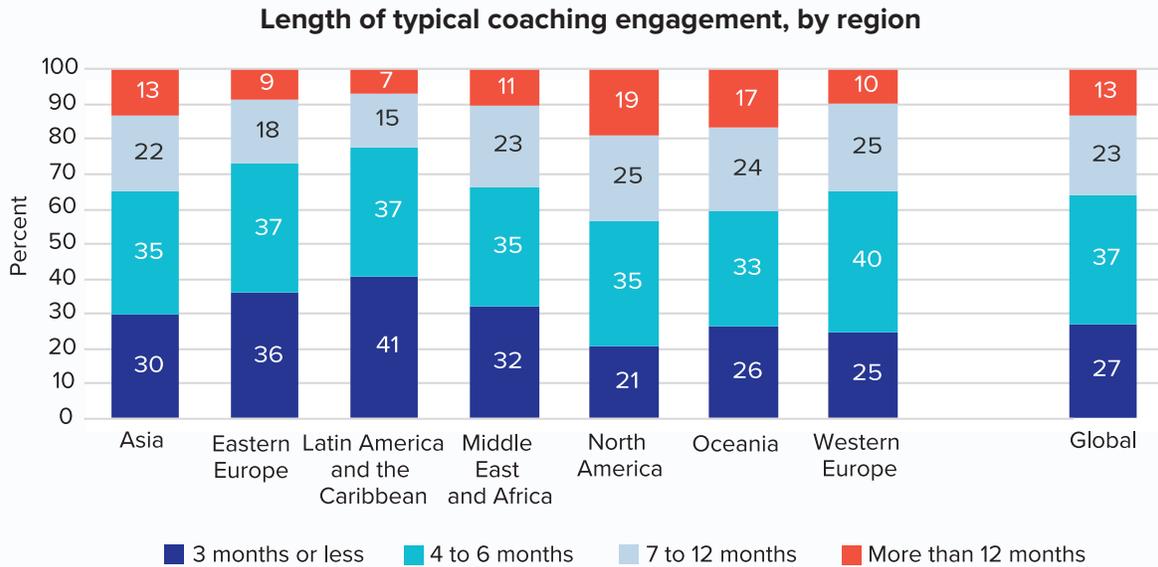


Length of coaching engagements

Across all regions, the typical coaching engagement lasts from four to six months.

Shorter engagements (three months or less) are most frequently observed in the emerging regions, most notably in Latin America and the Caribbean where 41% of engagements are for three months or less.

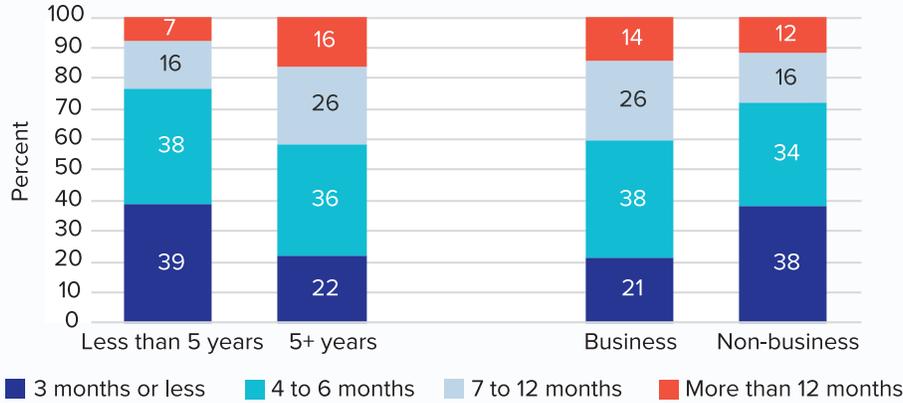
Longer engagements (seven months or more), are most often found in North America (44%) followed by Oceania (41%).



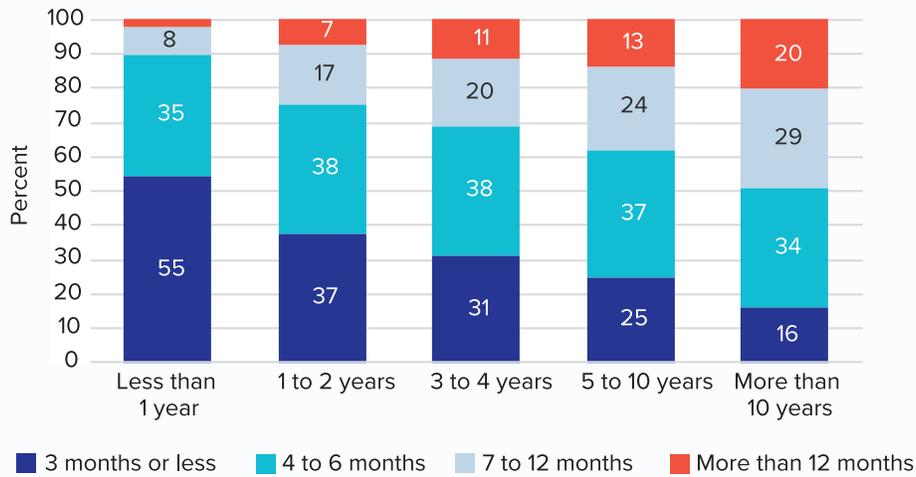
The length of the typical coaching engagement also varies with:

- **Years of coaching experience** – Almost one in two coach practitioners with 10-plus years of experience (49%) reported a typical engagement of seven months or longer, compared with fewer than one in 10 coach practitioners with two years or less of experience.
- **Main area of coaching** – Among coach practitioners with a business specialty, 40% of engagements are typically for seven or more months, compared with 28% for coach practitioners with a non-business specialty.
- **Position held by majority of clients** – Almost one in two coach practitioners who work primarily with executive clients (49%) report engagements lasting seven or more months compared with about one in four of those coaching individual contributors (25%) or personal clients (26%).

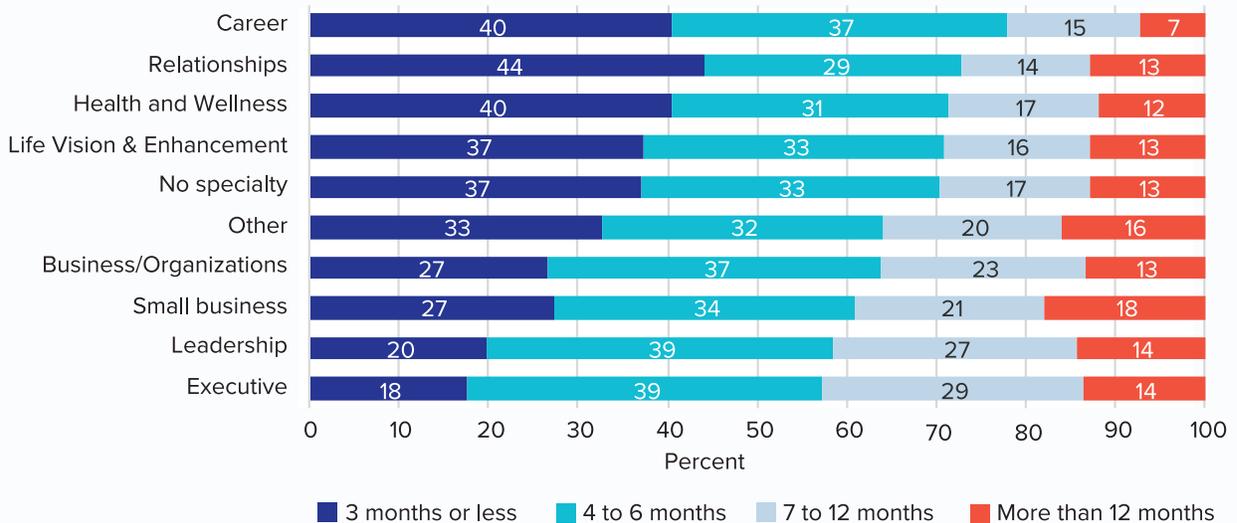
Length of coaching engagement by coaching experience and main area of coaching



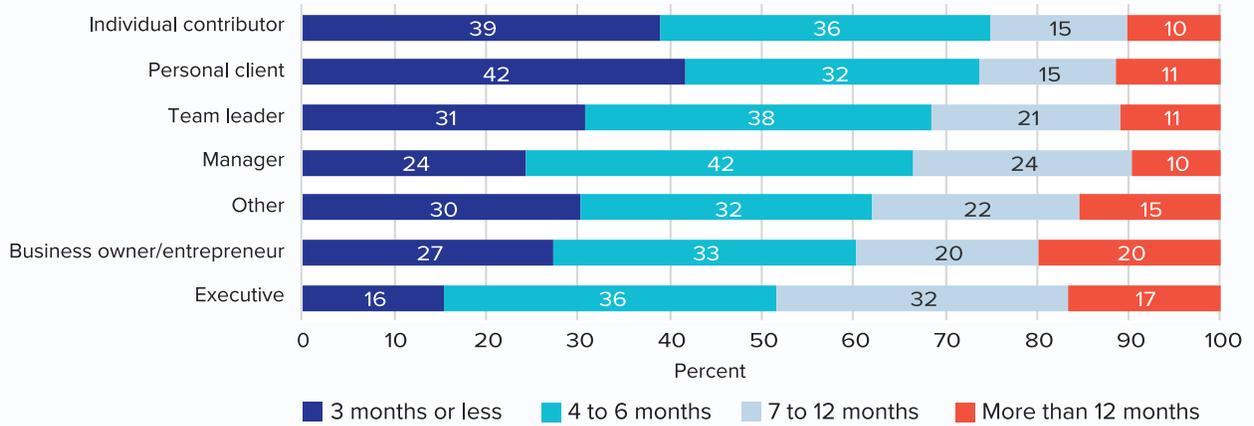
Length of coaching engagement by coaching experience



Length of coaching engagement by main area of coaching



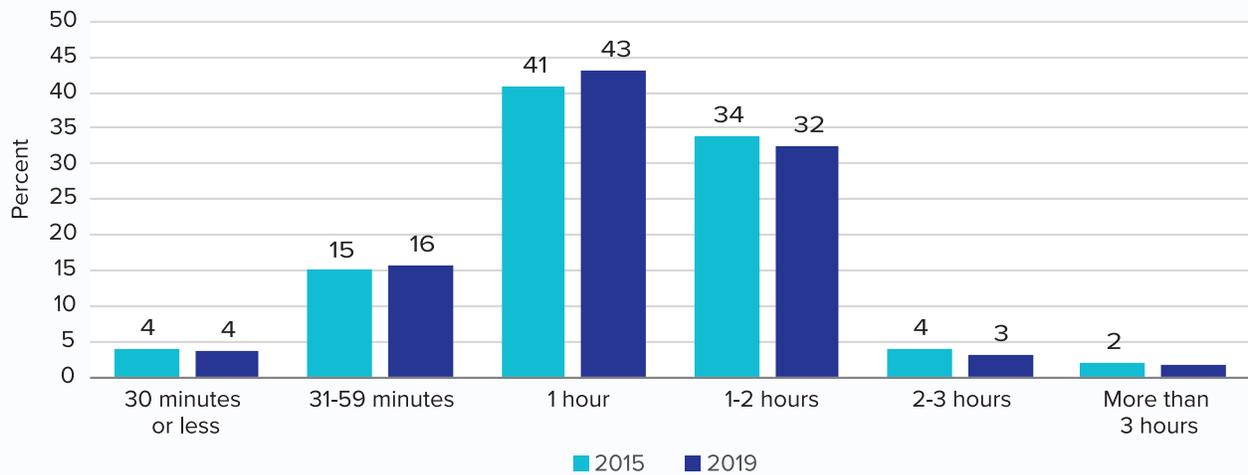
Length of coaching engagement by position held by majority of clients



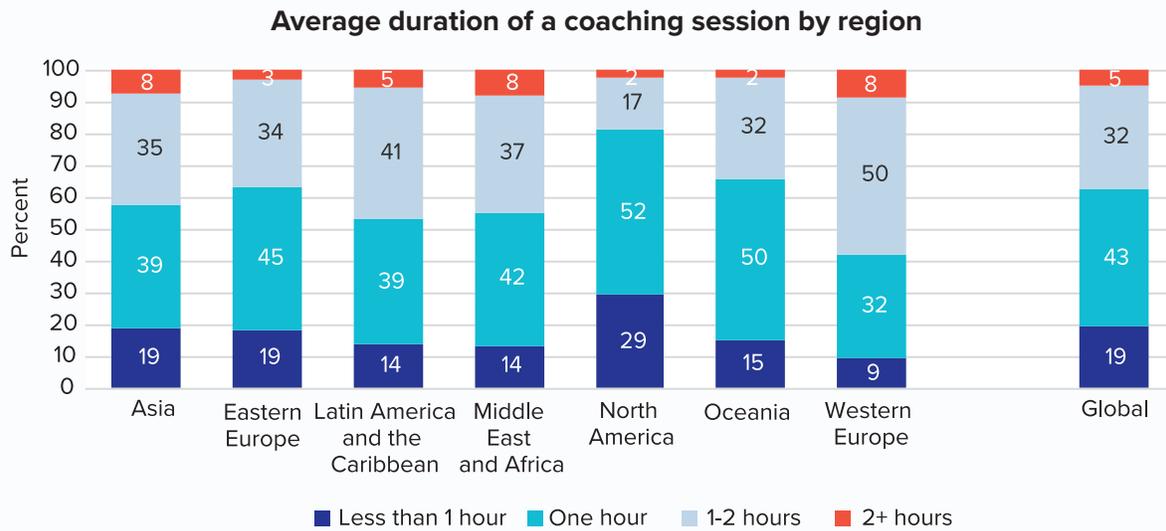
Coaching sessions

One hour remains the most frequently cited length of a coaching session (43%), followed by one to two hours (32%). That is, three in four sessions last between one and two hours. This is unchanged from 2015.

Average duration of a coaching session

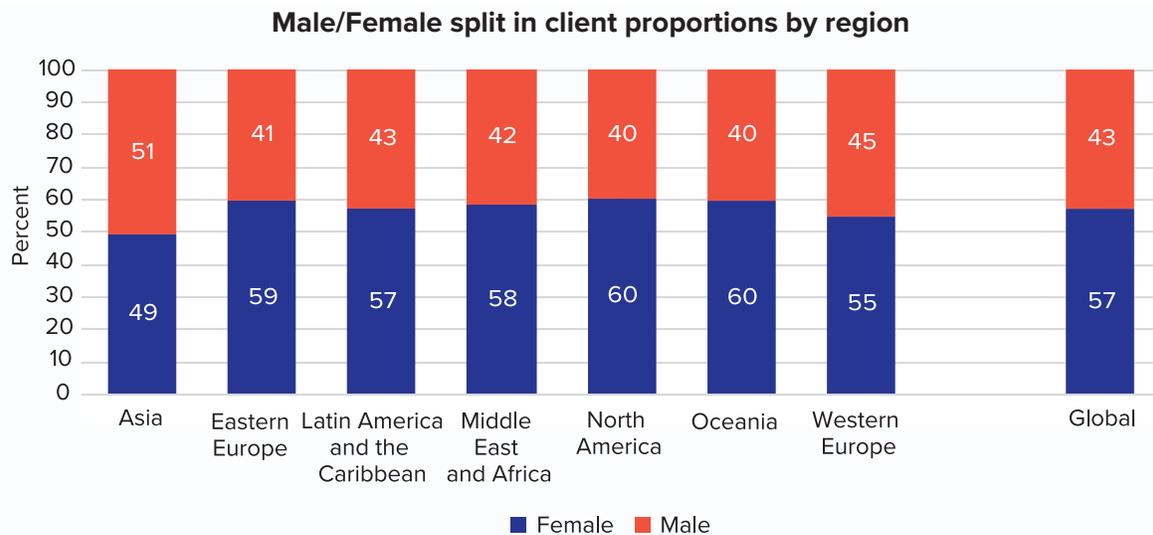


On average, coaching sessions are shortest in North America, where 29% last less than one hour and fewer than one in five (19%) last more than one hour. Sessions tend to be longer in Western Europe, where 59% last for more than one hour.



Clients' gender

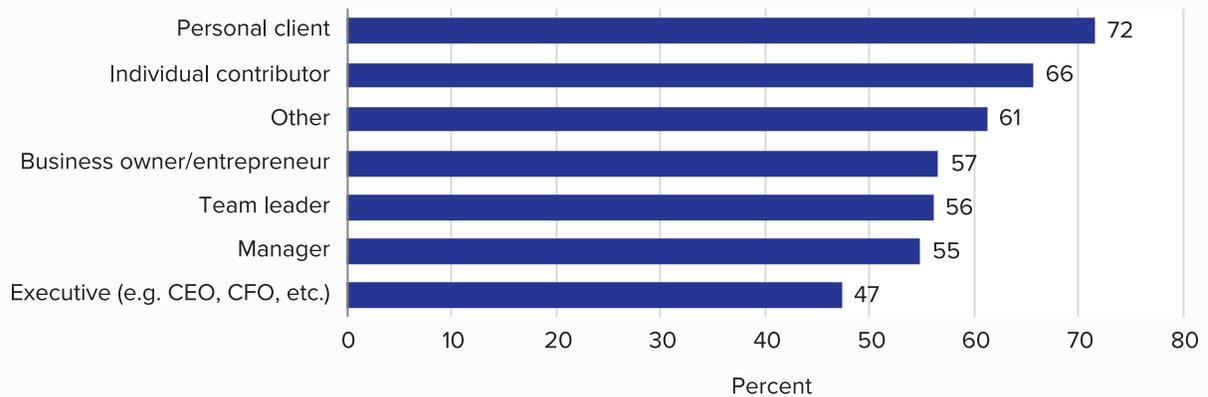
The majority of coaching clients are female, ranging from 60% in North America and Oceania to 49% in Asia with an average of 57%.



The female share of clients varies with:

- Among female coach practitioners, 62% of clients are also female, compared with 46% of clients where the coach practitioner is male.
- Among coach practitioners with a business specialty, females account for 52% of clients compared with 67% among those with a non-business specialty.
- From 72% among those who mainly coach personal clients to 47% of those mainly coaching executives
- Females comprise 64% of clients coached by Millennials compared with 58% for Generation X coach practitioners and 55% among Baby Boomers.

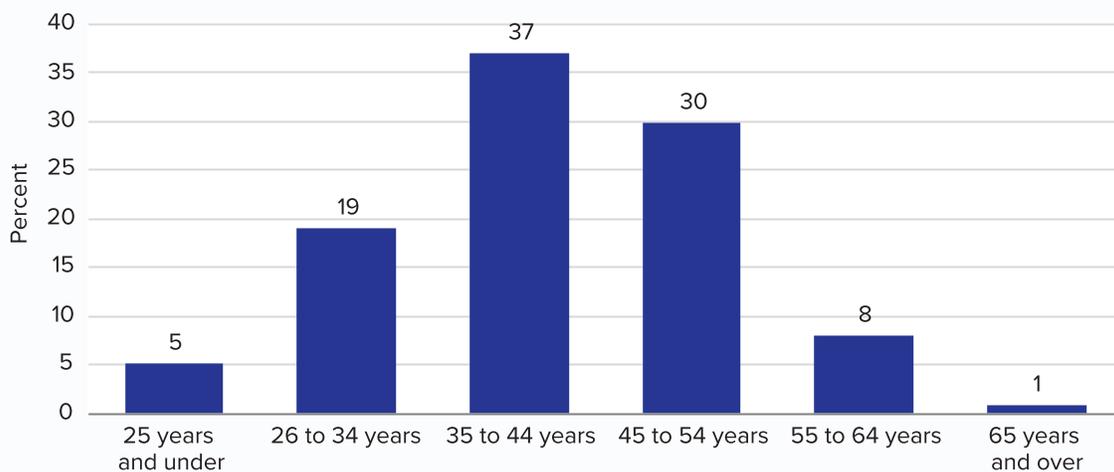
Average female client proportion by position held by majority of clients



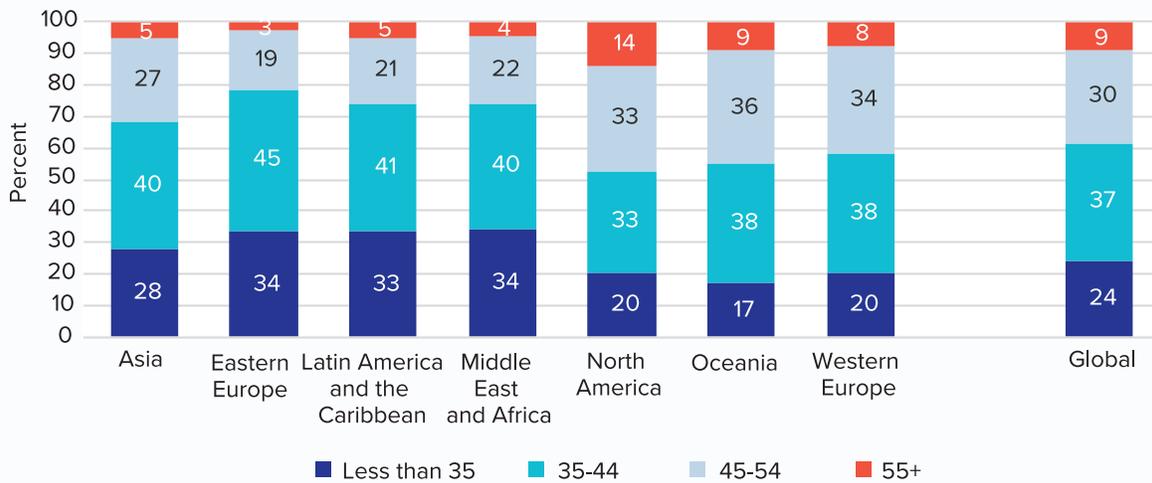
Client Age Composition

The typical coaching client is aged between 35 and 44 years (37%). A little under one in three clients (30%) are in the 45–54 age range. Around one in four (24%) are aged under 35 years. That age distribution is unchanged from the position in 2015.

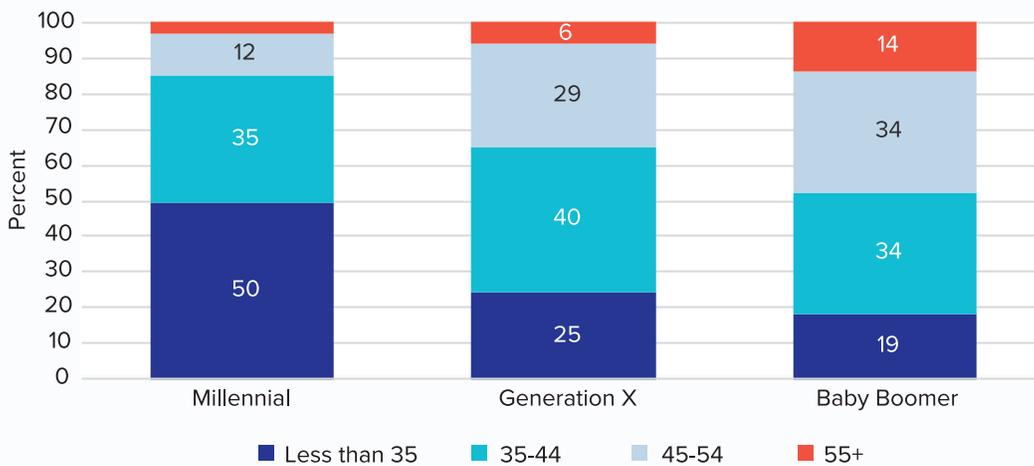
Client age composition



Client age composition by region



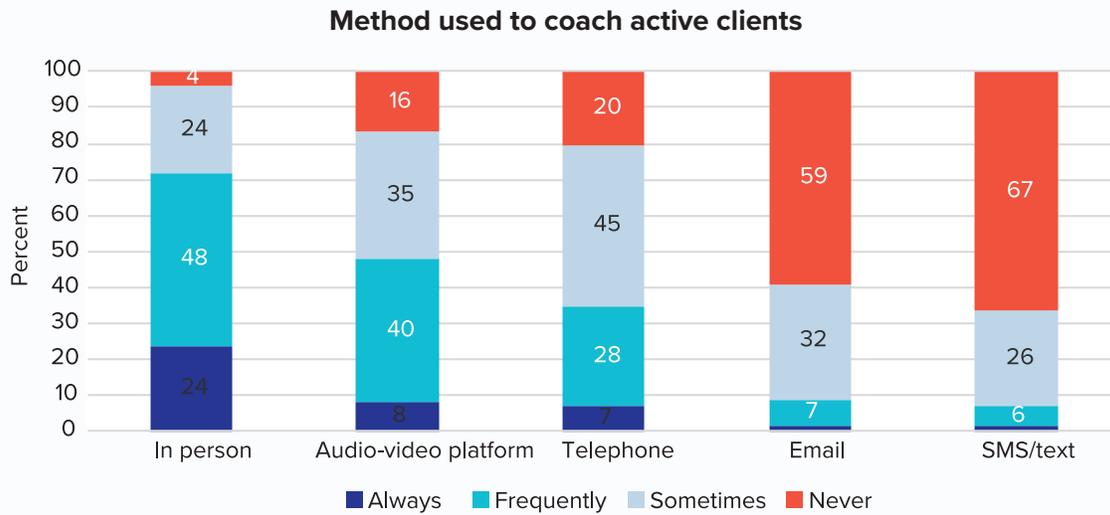
Client age composition by age generation of coach



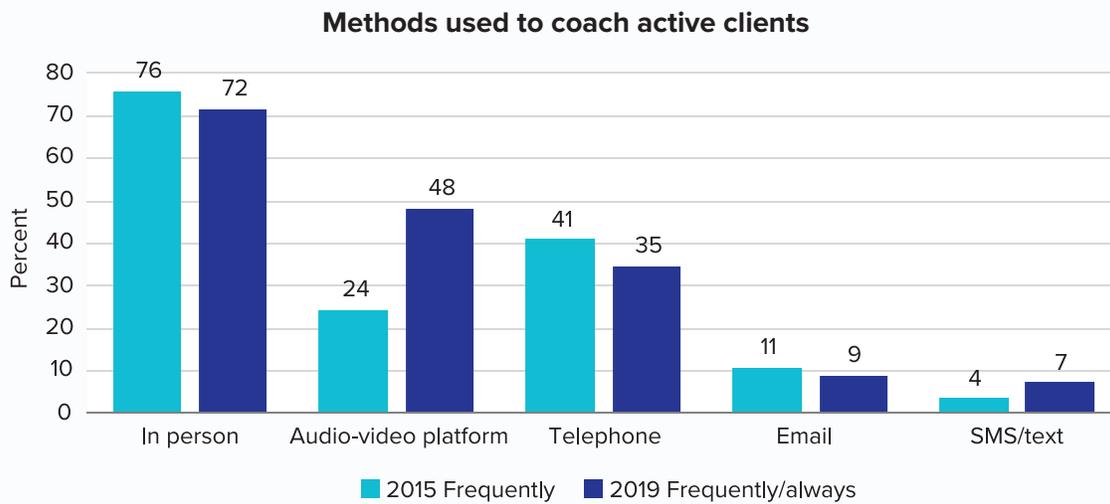
The typical coaching client is aged between 35 and 44 years (37%).

Methods used to coach clients

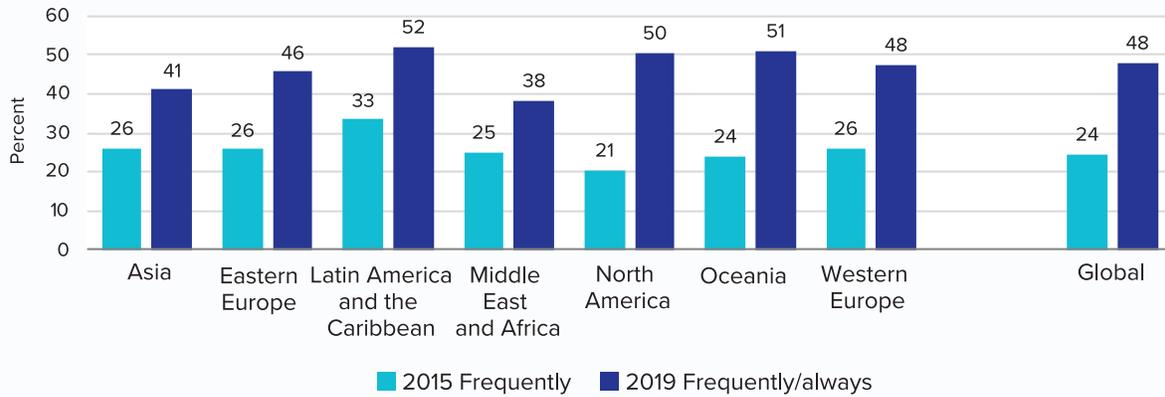
Coach practitioners most frequently engage with their clients in person. Almost one in four (24%) always engage on that basis while close to one in two (48%) do so frequently.



The use of audio-video platforms has doubled in the past four years, from 24% in 2015 to 48% in 2019.

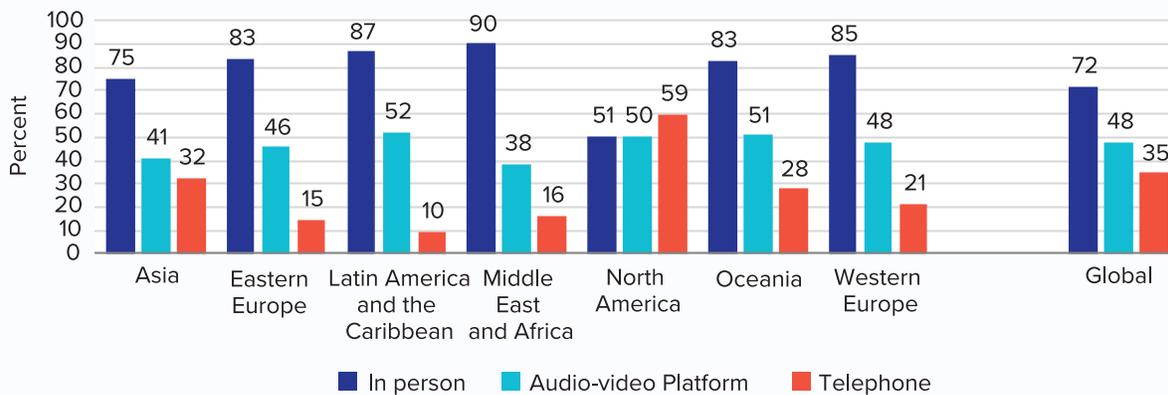


Use of audio-video platform to coach clients: Frequently/always



The mix of methods used to contact clients varies by region. Coach practitioners in the Middle East and Africa rely primarily on in-person coaching (90%). By contrast, coach practitioners in North America use a mix of in-person (51%), audio-video platforms (50%) and telephone (59%).

Use of in-person, audio-visual platforms and telephone by region, always or frequently



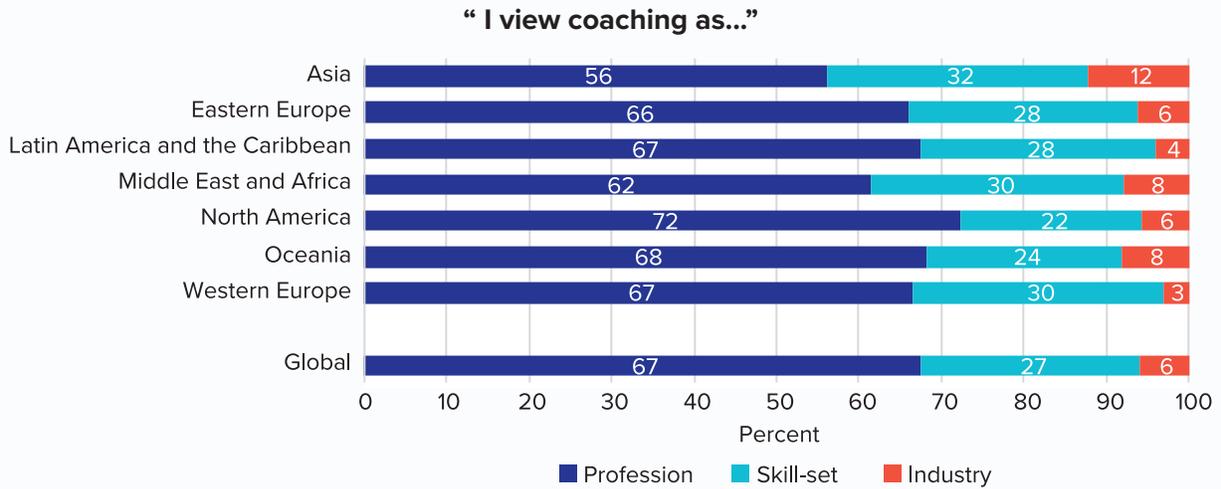
Coach practitioners in the Middle East and Africa rely primarily on in-person coaching.

KEY ISSUES AND FUTURE TRENDS

Views on coaching

The view that coaching is a profession is most strongly felt in North America (72%).

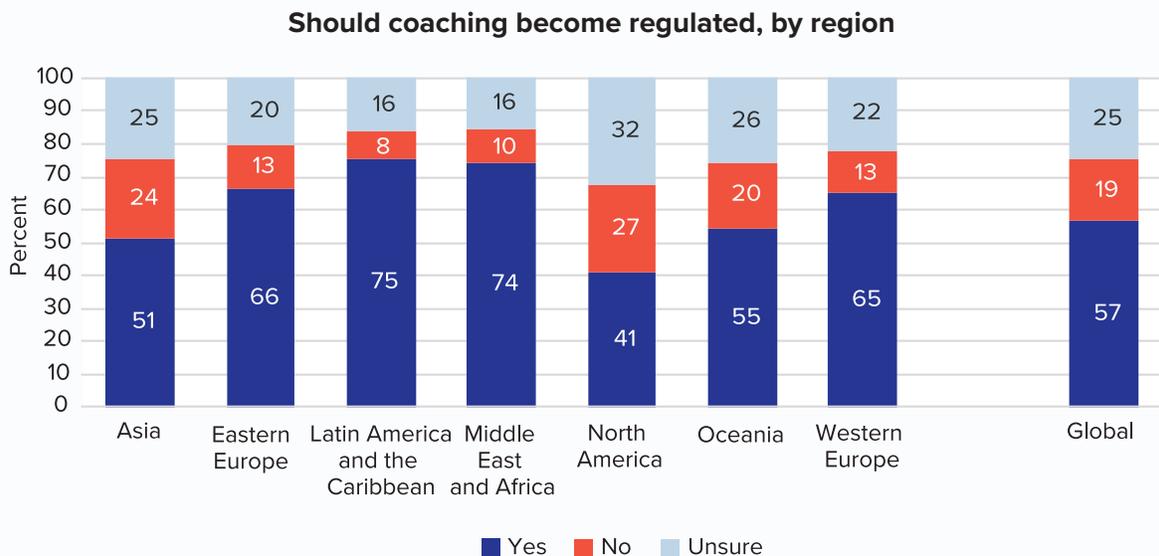
While a majority of coach practitioners in Asia (56%) view coaching as a profession, almost one in three (32%) view coaching as a skillset along with 12% who consider coaching to be an industry.



Should coaching become regulated?

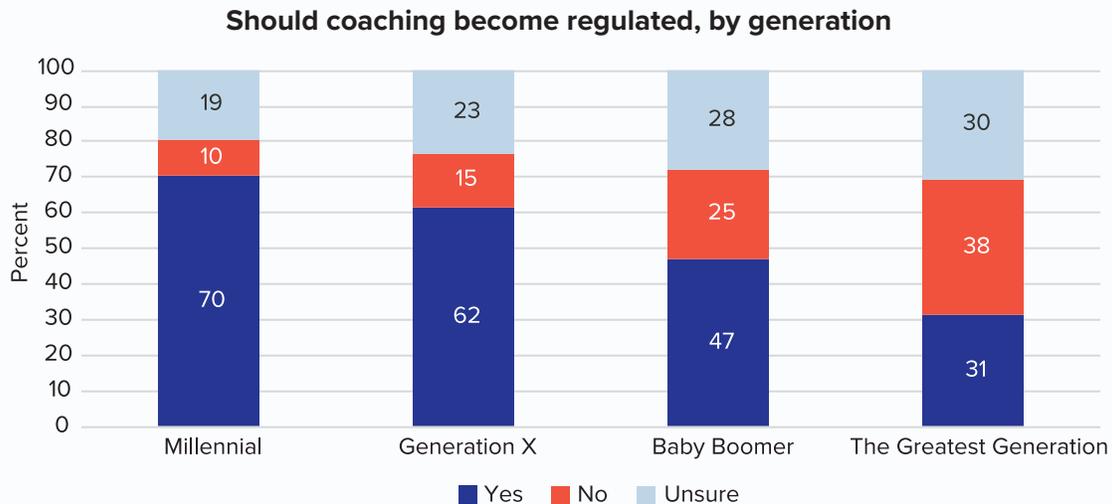
An increasing majority of coach practitioners believe that coaching should become regulated. In 2015, 52% considered that coaching should become regulated. By 2019, 57% of coach practitioners took that position, an increase of five percentage points.

This shift is driven by the increase in the proportion of coach practitioners in North America who agree with that position from 37% in 2015 to 41% in 2019.



Support for regulation of coaching tends to be stronger among:

- **Female coach practitioners** – 58% in favor versus 53% of male coach practitioners.
- **Younger coach practitioners** – 70% of Millennials versus 47% of Baby Boomers.



Who should regulate coaching?

Across the regions, support for regulation by professional coaching organizations ranged from 78% in Western Europe to 89% in North America. In Western Europe, a little under one in five (18%) favored a government entity, compared with 6% in North America.



Obstacles to building a strong coaching culture

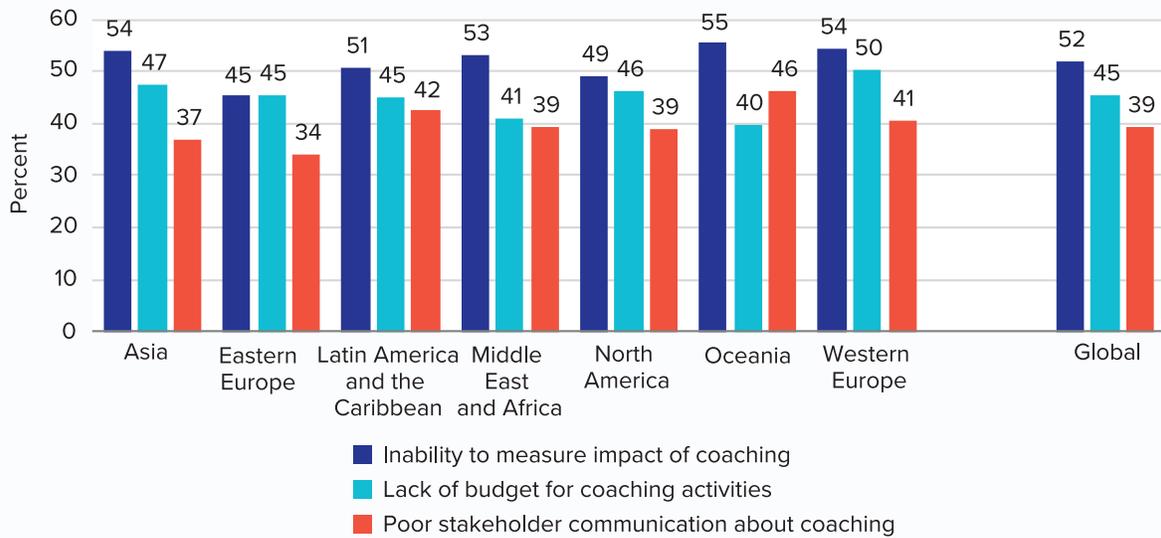
The top three obstacles coach practitioners identified to building a strong coaching culture in an organization were:

- Inability to measure impact of coaching (52%)
- Lack of budget for coaching activities (45%)
- Poor stakeholder communication about coaching (39%)

Obstacles to building a strong coaching culture inside an organization



Obstacles to building a coaching culture inside an organization



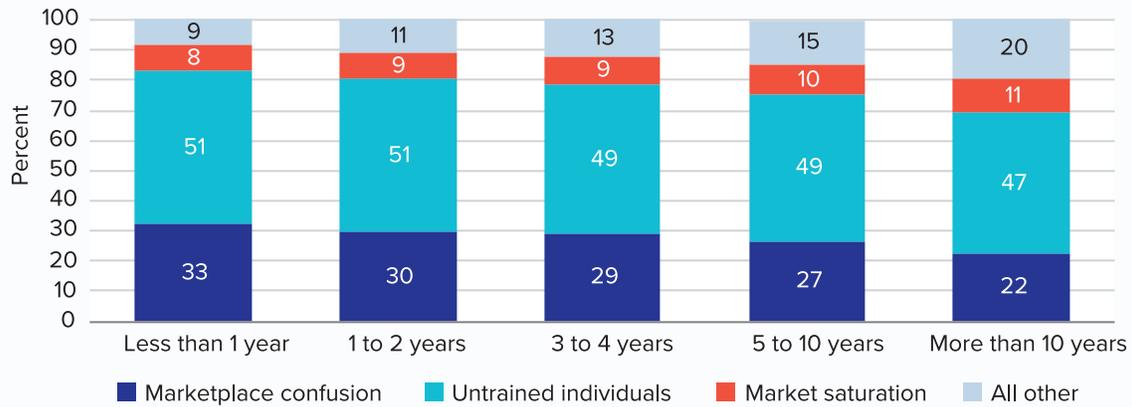
Obstacles to coaching over next 12 months

Respondents to the 2019 survey were asked to say what they believe to be the biggest obstacle for coaching in the next 12 months. It should be emphasized that the survey was undertaken prior to the coronavirus pandemic and the results should be viewed within that context.

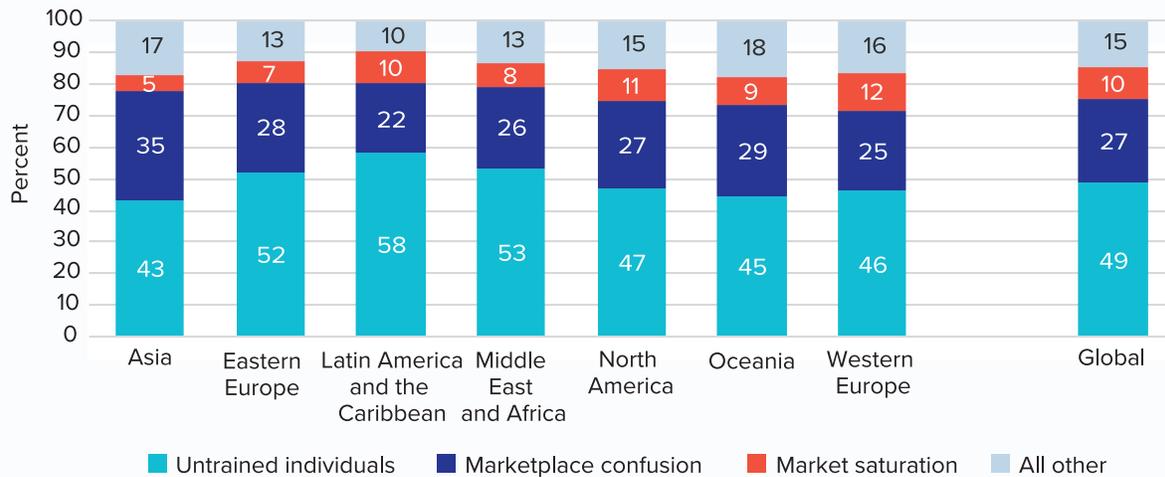
Coach practitioners continue to express concern around untrained individuals who call themselves coaches. Almost one in two respondents (49%) identified untrained individuals as the biggest obstacle over the next 12 months, up from 44% in 2015.

Coach practitioners also remain concerned about marketplace confusion about the benefits of coaching 27% in 2019 and 2015.

Obstacles for coaching over next 12 months by coaching experience

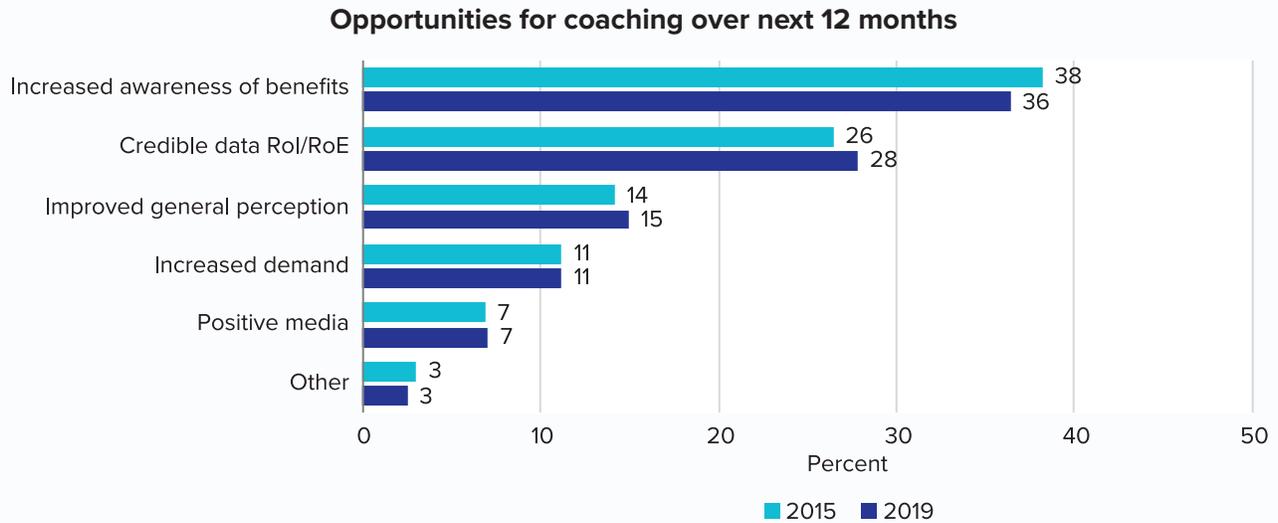


Obstacles to coaching over next 12 months by region

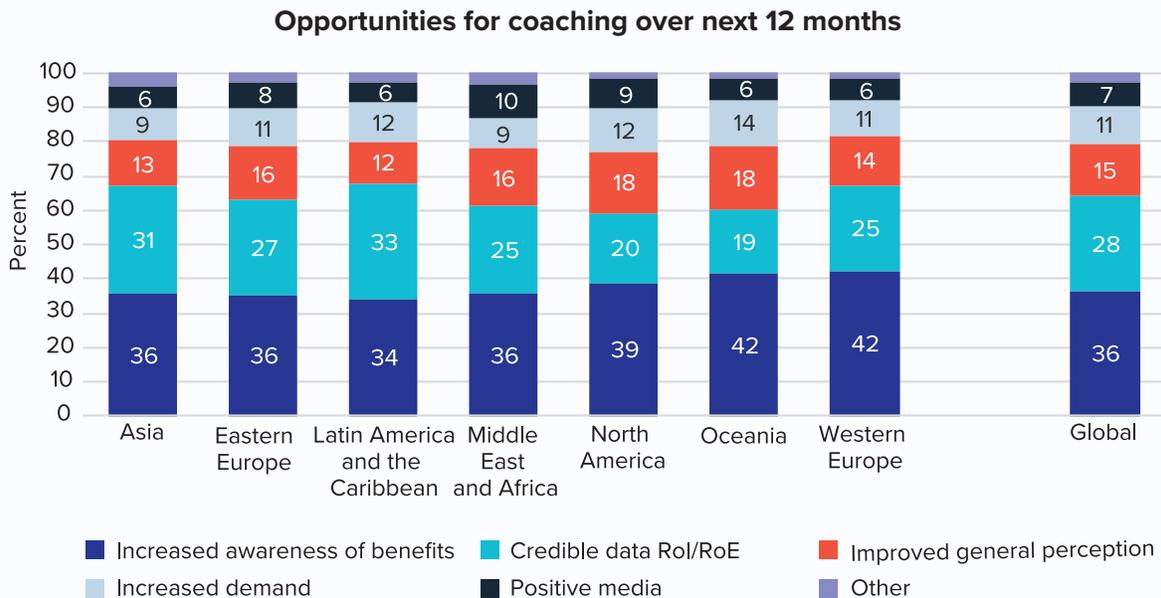


Opportunities for coaching over next 12 months

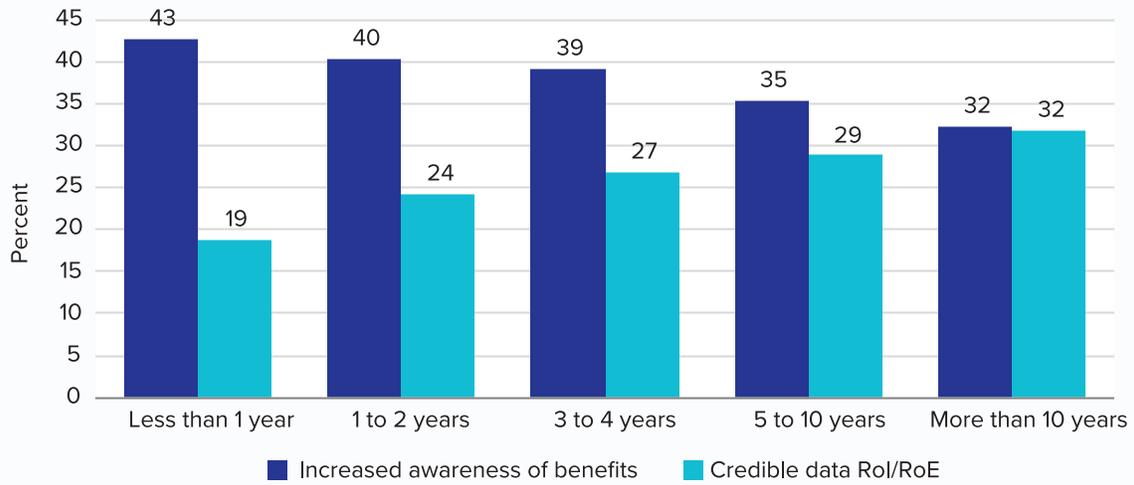
When asked about the biggest opportunity for coaching over the next 12 months, respondents most frequently cited increased awareness of the benefits of coaching (36%) and credible data on the Return on Investment (ROI)/Return on Expectations (ROE) (28%). The same two opportunities were also most often mentioned in 2015.



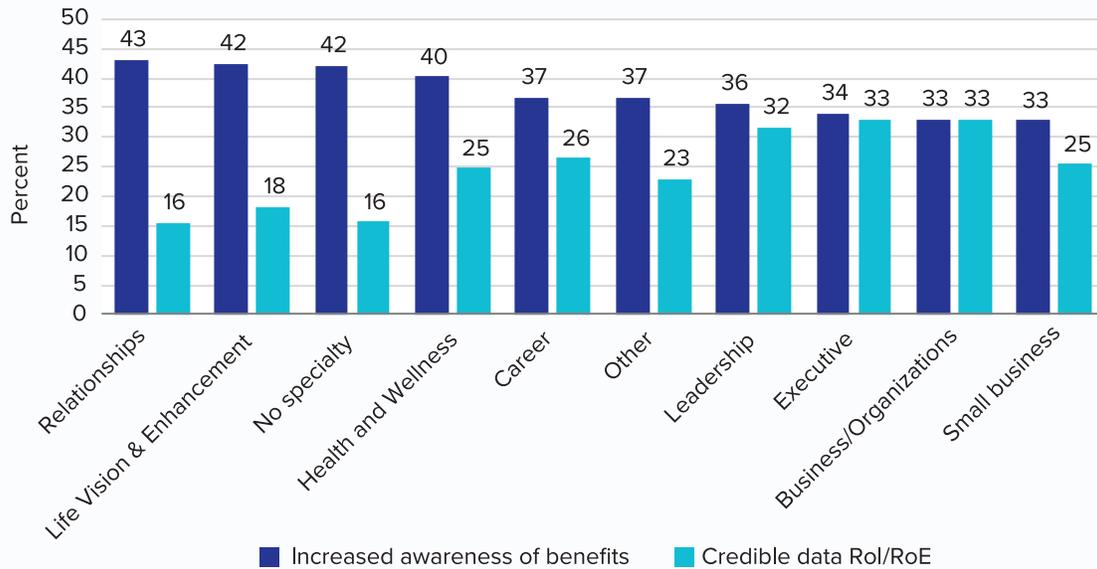
While the top three opportunities cited by coach practitioners did not vary by region, there were some differences in emphasis. Broadly, coach practitioners in the more established regions were more likely than those in emerging regions to view the main opportunity as being around increased awareness of benefits.

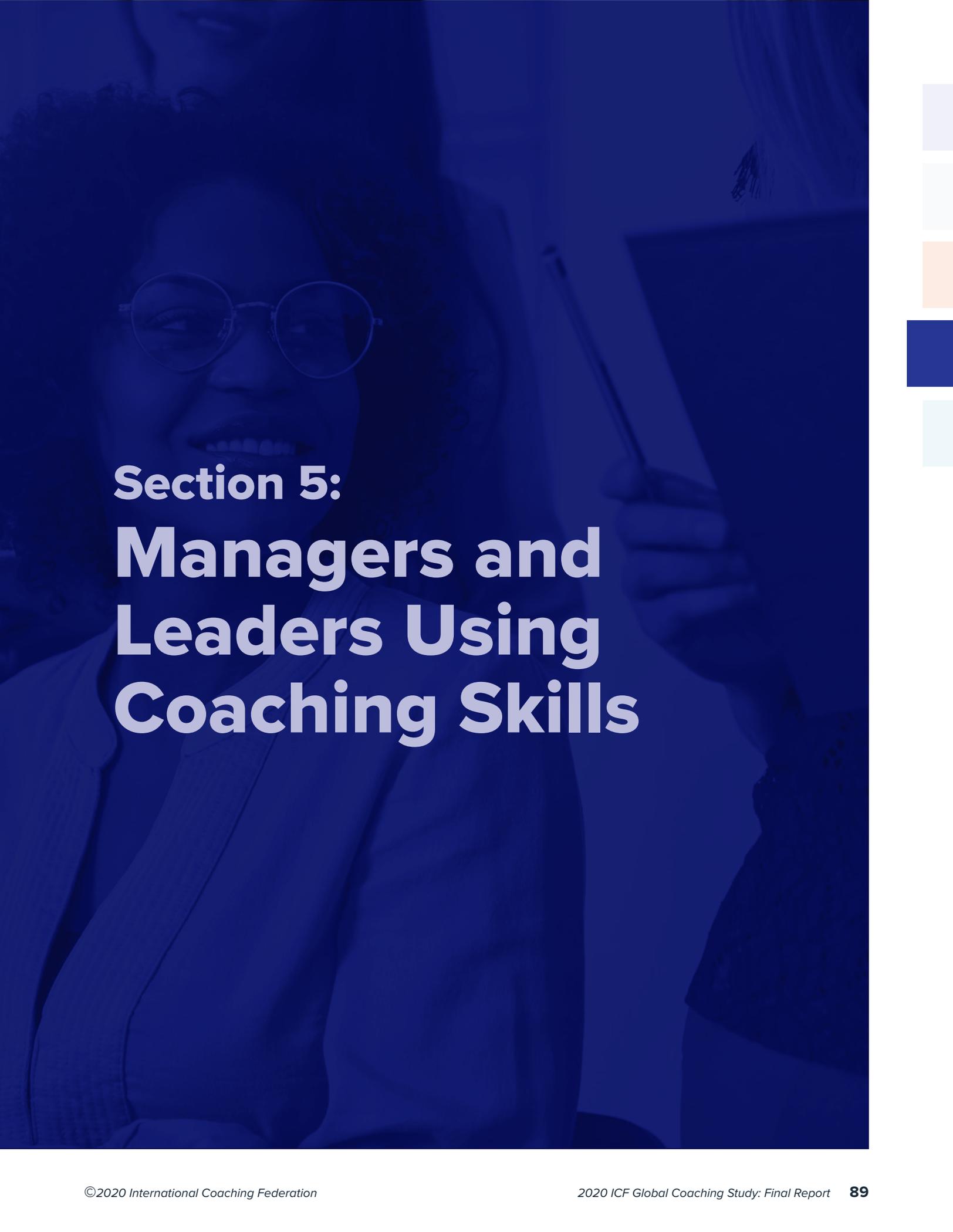


Opportunities for coaching over next 12 months by coaching experience



Opportunities for coaching over next 12 months, by main area of coaching





Section 5:
**Managers and
Leaders Using
Coaching Skills**

INTRODUCTION

This section presents a profile of survey respondents who did not identify as coach practitioners but who use coaching skills within their working environment, under two broad headings:

- Human resources/talent development managers and directors who use coaching skills
- Managers and leaders who use coaching skills

Unless otherwise specified, those two groups are collectively referred to as “managers/leaders using coaching skills.”

The survey findings are presented under three headings, as follows:

- Demographics – age, gender and level of education
- Training and credentialing – client expectations, receipt of coach-specific training and hours completed, plans for the next 12 months, membership in professional organizations, and certifications/credentials from professional organizations
- Key issues and future trends – respondents’ views on whether coaching should be regulated, building a coaching culture within the organization and obstacles and opportunities over the next 12 months

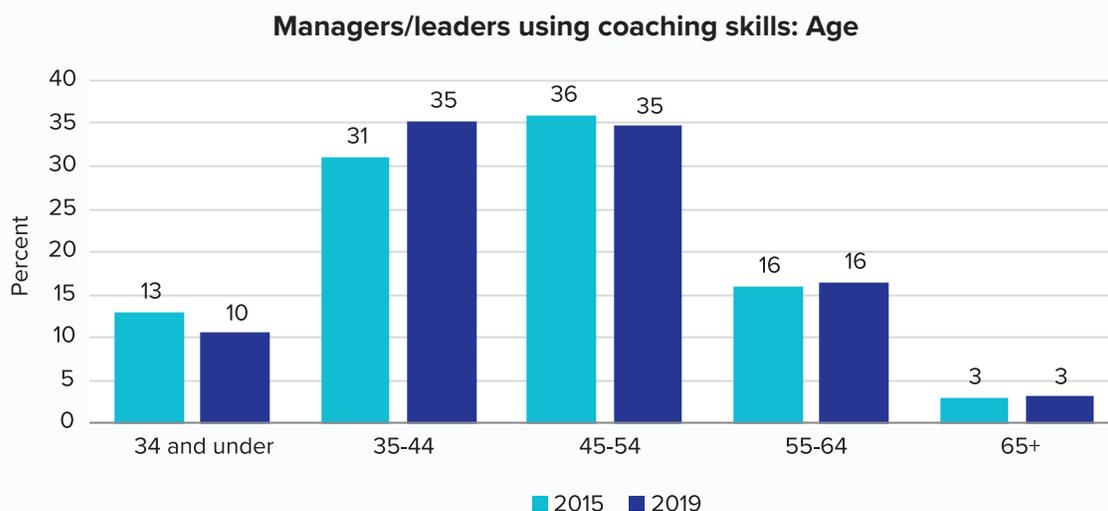
Managers/leaders using coaching skills



DEMOGRAPHICS

Age

The age profile of managers/leaders using coaching skills has remained broadly similar to 2015.



Generations by Year

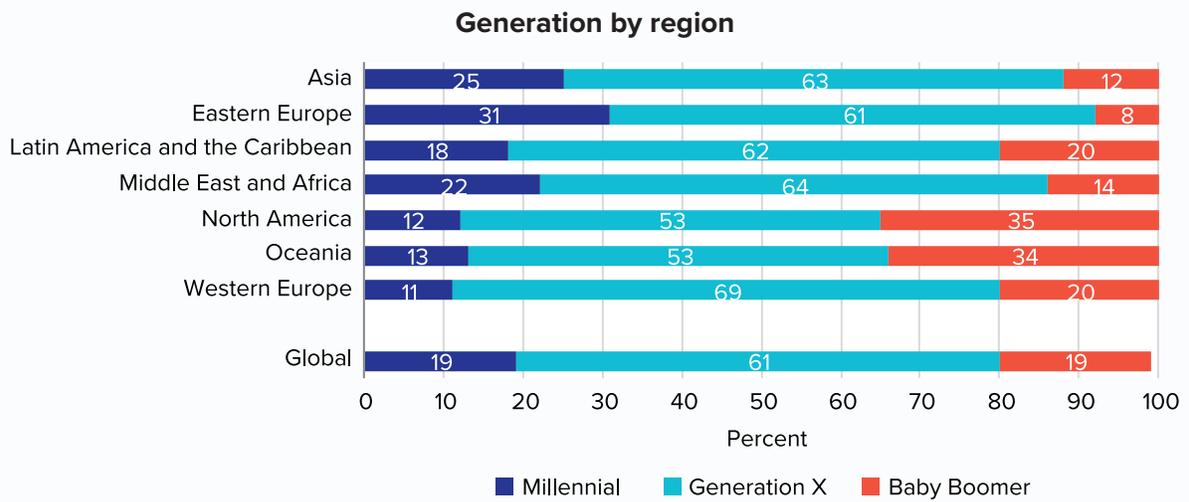
| Generations | Birth Years |
|---------------------|------------------|
| Generation Z | 1997-1999 |
| Millennials | 1982-1996 |
| Generation X | 1965-1981 |
| Baby Boomers | 1946-1964 |
| Greatest Generation | 1945 and earlier |

From a generational perspective, Generation X accounts for the majority (61%) of managers/leaders using coaching skills. The remainder are equally split between Millennials, and Baby Boomers.

There are distinct regional differences in the distribution across the generational spectrum. Managers/leaders born in the Generation X years are in the majority across all regions, from 53% in North America to 69% in Western Europe.

The Millennial share ranges from 11% in Western Europe to 31% in Eastern Europe. The range in the Baby Boomer share is slightly wider, from over one in three managers/leaders in North America (35%) and Oceania (34%) to just one in 12 in Eastern Europe (8%).

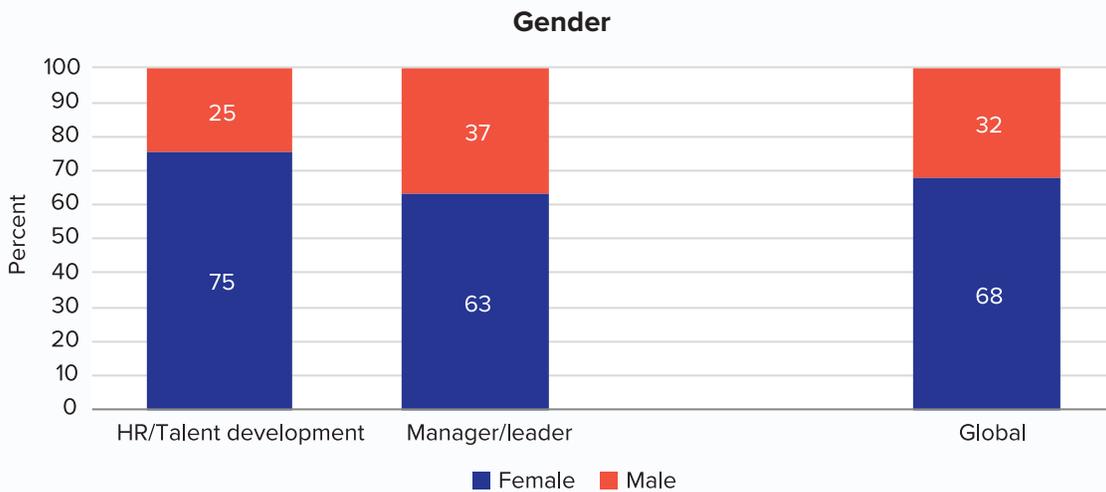
NOTE:: The sample bases for respondents in the Generation Z and The Greatest Generation groups are too low to report separately in age generation breaks.



Gender

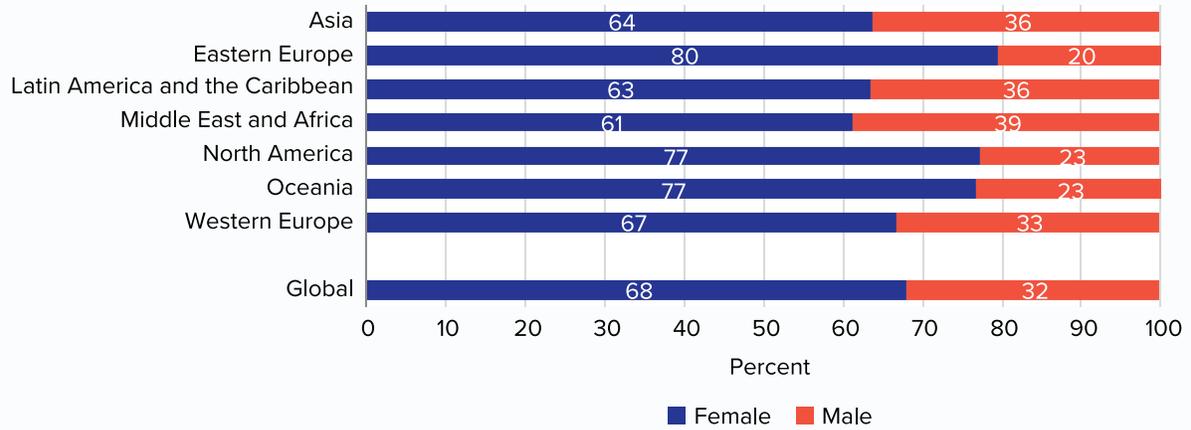
For the 2019 survey, respondents were asked if they consider themselves female, male or gender neutral/gender fluid.

Females account for two in three of those using coaching skills (68%), a slight increase on their 66% share in the 2015 survey.



Fewer than 10 managers/leaders using coaching skills identified as gender neutral/fluid. Given the low sample base, that group is not separately identified in gender breaks, though their responses are fully included in reporting other survey results.

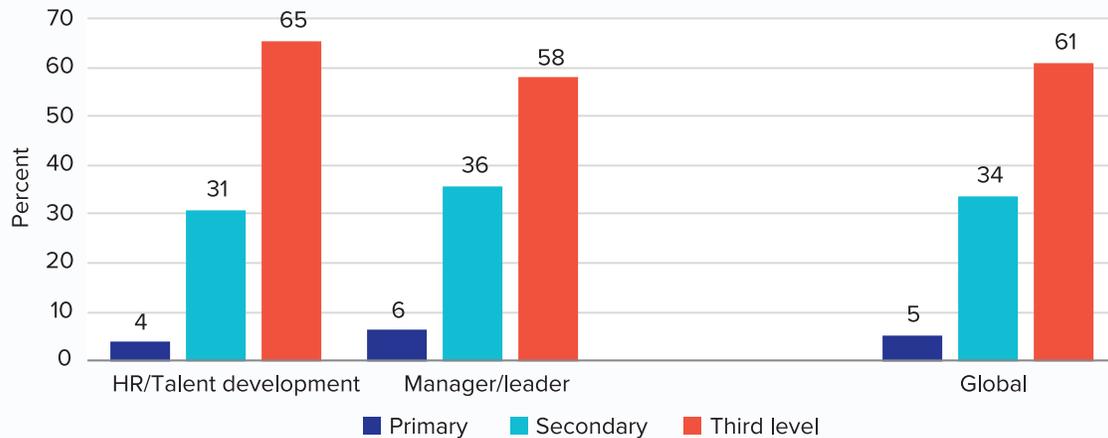
Gender by region



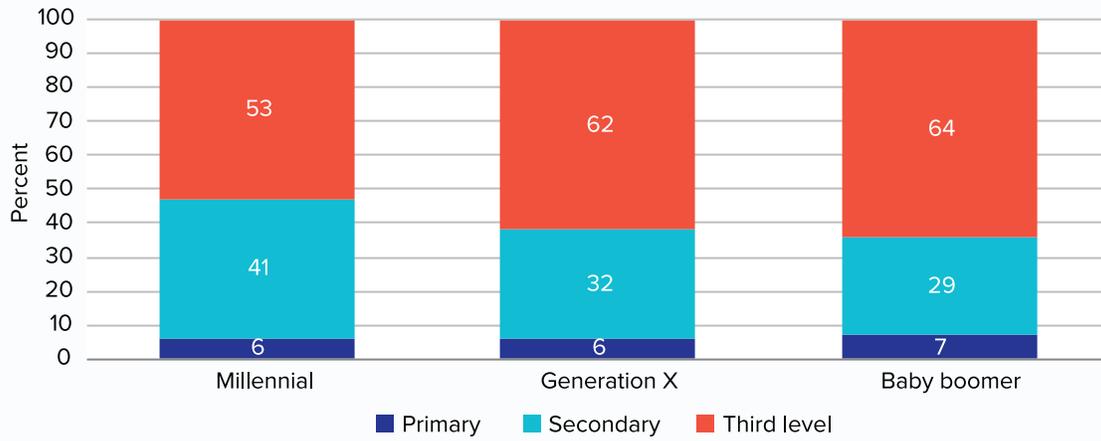
Education

The majority of managers/leaders using coaching skills (61%) have a third-level education (i.e., master’s or doctoral level). One in three (34%) are educated to secondary level (i.e., a bachelor’s degree). The remaining 5% are educated to primary level (i.e., completed education before university). The proportions are little changed from the 2015 survey (61% third level, 32% secondary and 7% primary).

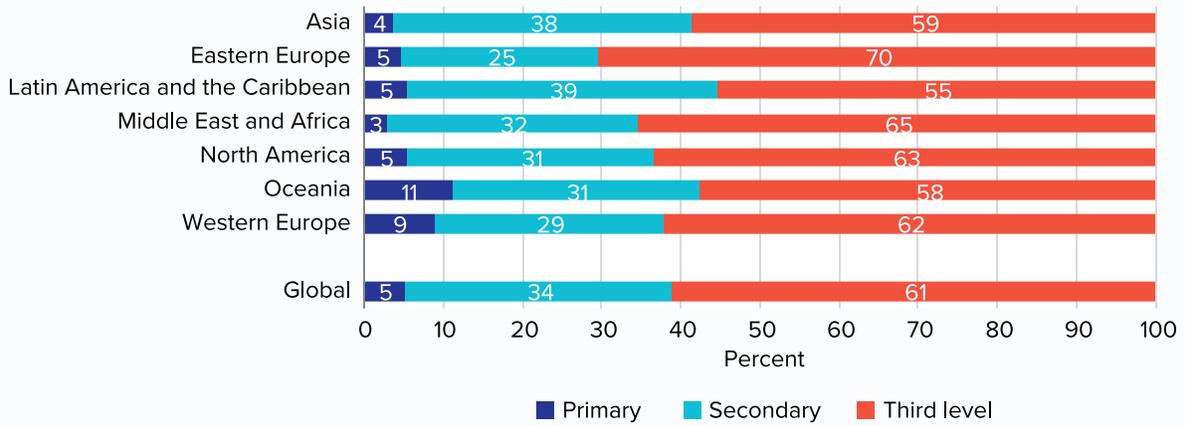
Education



Education by generation



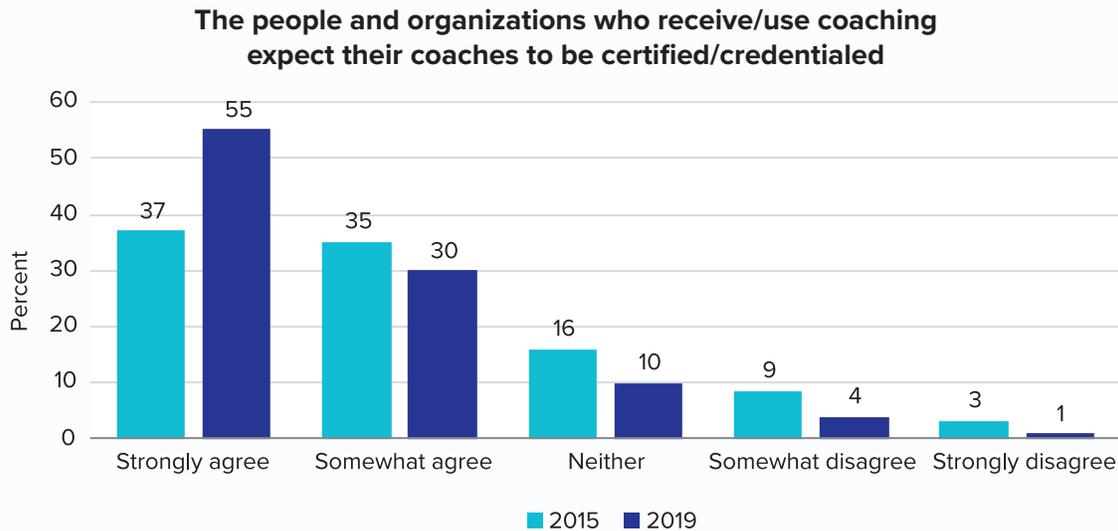
Education by region



TRAINING

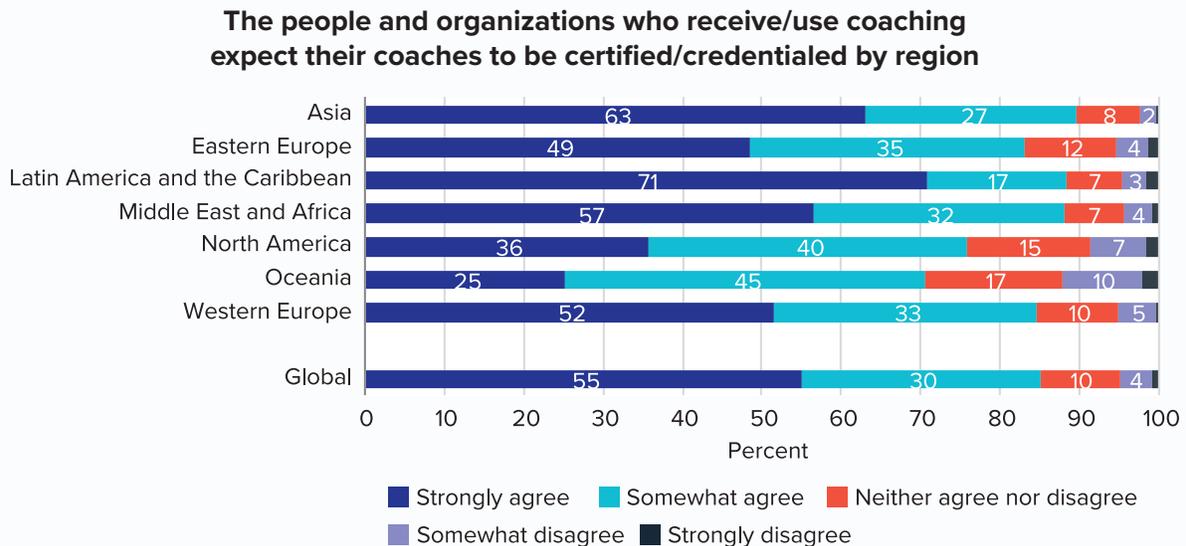
Client Expectations

There has been a sharp rise in the strength of agreement with the proposition that clients expect their coach practitioners to be certified/credentialed. The proportion of respondents who strongly agree rose from 37% in 2015 to 55% in 2019.



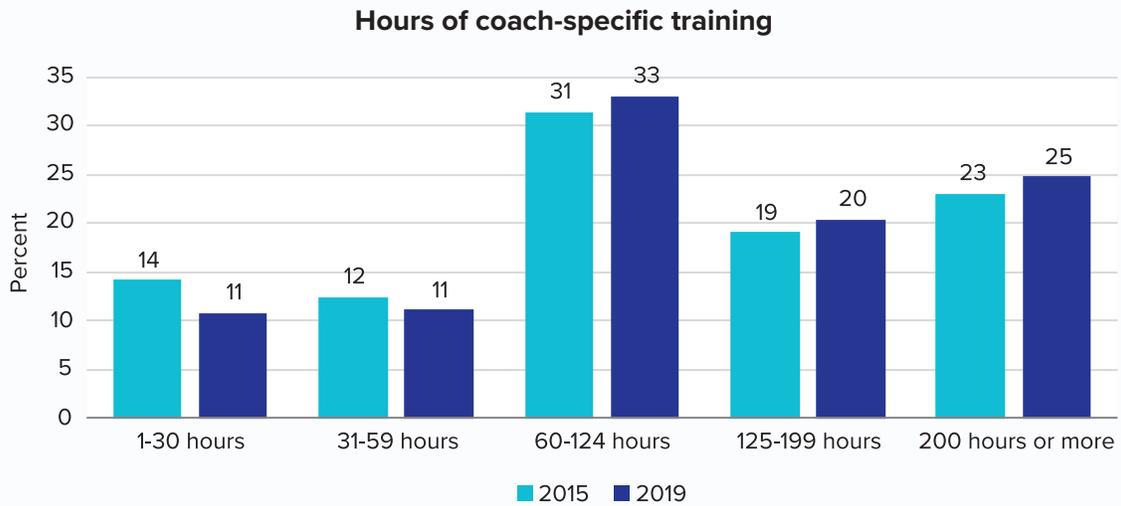
There are significant regional contrasts in the strength of agreement with this idea. The proportion of respondents who strongly agree was highest in Latin America and the Caribbean (71%), followed by Asia (63%).

The proportion of respondents who strongly agree was also higher among Millennials (56%) and Generation X respondents (57%) when compared with Baby Boomers (49%); however, the latter were more likely to “somewhat agree” (34% compared with 28% of Generation X and 31% of Millennials).

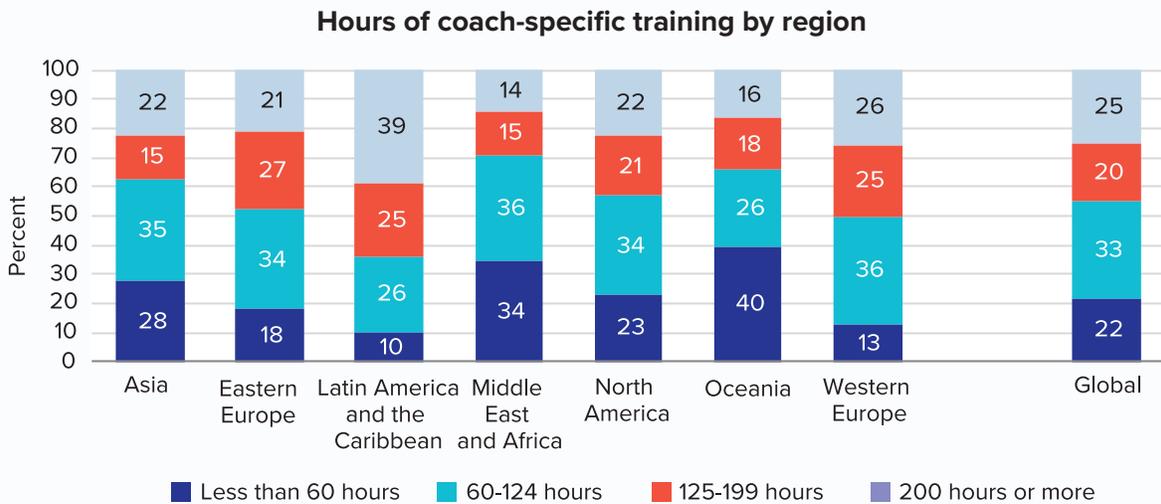


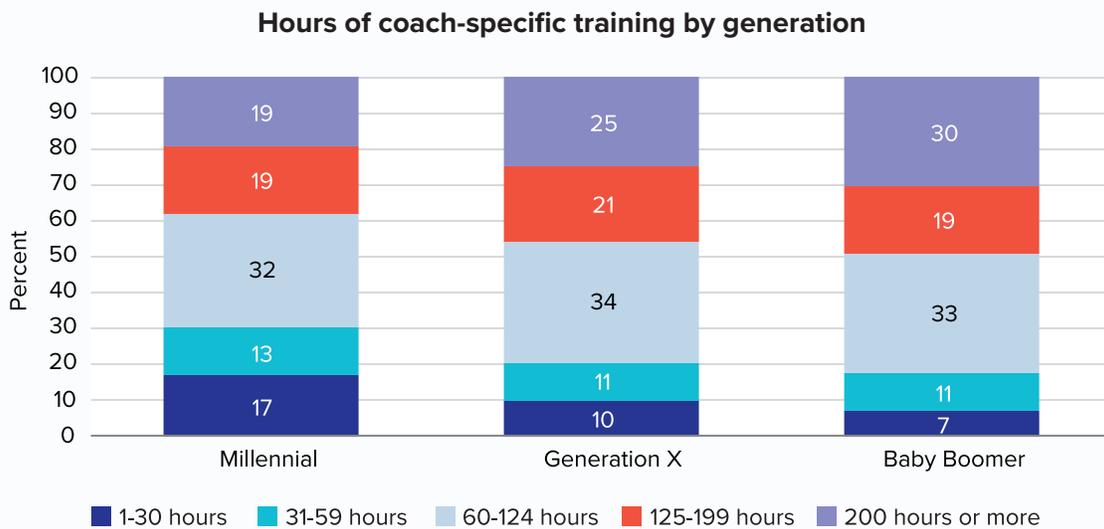
Hours of coach-specific training

Among those who said they have received coach-specific training, more than three quarters (78%) said they had received 60 or more hours, up from 73% in 2015.



The proportion of managers/leaders with 200-plus hours of training varies widely by region, from 39% in Latin America and the Caribbean to 14% in the Middle East and Africa.





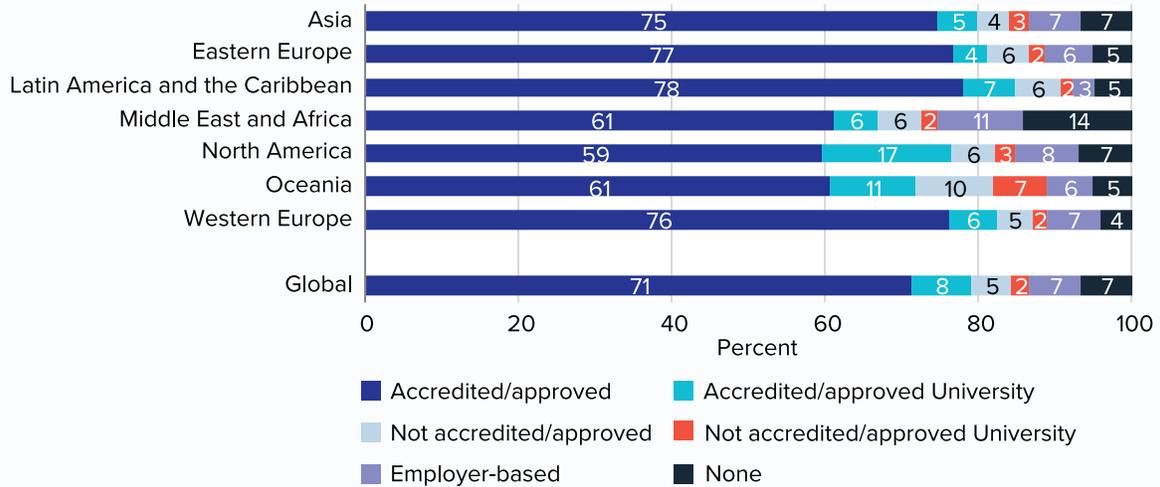
Receipt of Coach-Specific Training

More than nine in 10 managers/leaders (93%) have received coach-specific training. The majority (79%) received training that was accredited/approved by a professional coaching organization, up from 73% in 2015.



The proportion receiving accredited/approved training is highest in Latin America and the Caribbean (85%). University-based accredited/approved training features most prominently in North America (17% compared to an average of 8%).

Receipt of coach-specific training by region



Receipt of accredited/approved training varies slightly across other demographics:

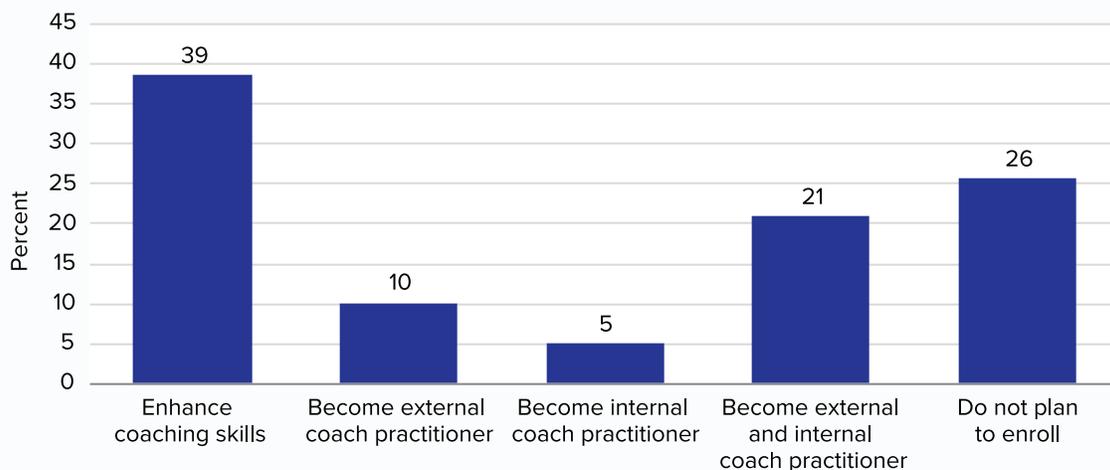
- **Gender** – 72% of females said they had received training that was accredited/approved by a coaching organization compared to 68% of males.
- **Age generation** – Generation X respondents were more likely to report receipt of accredited/approved training (82%). Comparatively, 73% of Millennial managers/leaders and 78% of Baby Boomers reported receipt of accredited training.

Plans for next 12 months

Almost three in four managers/leaders (74%) said they plan to enroll in additional coach-specific training in the next 12 months, including:

- 39% saying they want to enhance their coaching skills.
- 10% aiming to become an external coach practitioner.
- 5% enrolling to become an internal coach practitioner.
- 21% seeking to become both an external and internal coach practitioner.

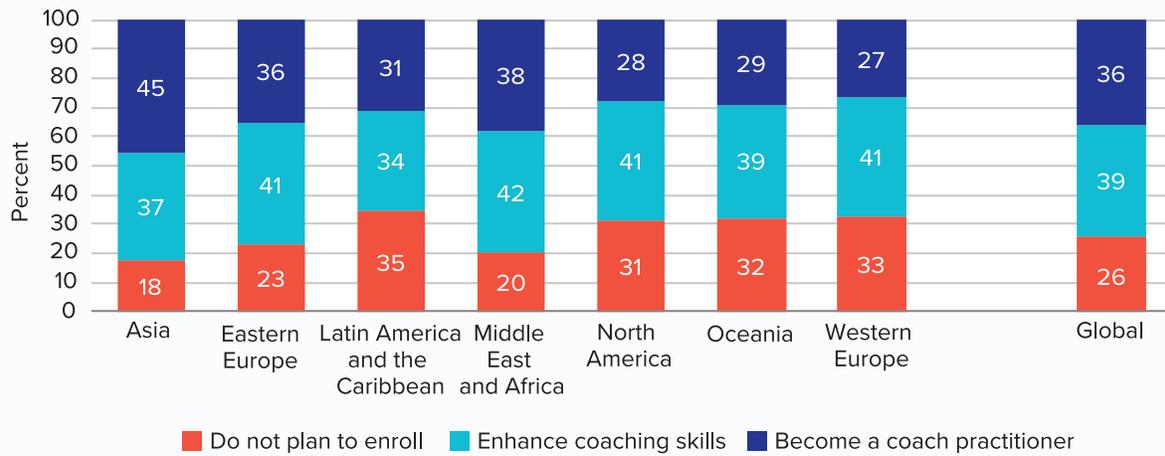
Enroll in additional coach-specific training: Plans for next 12 months



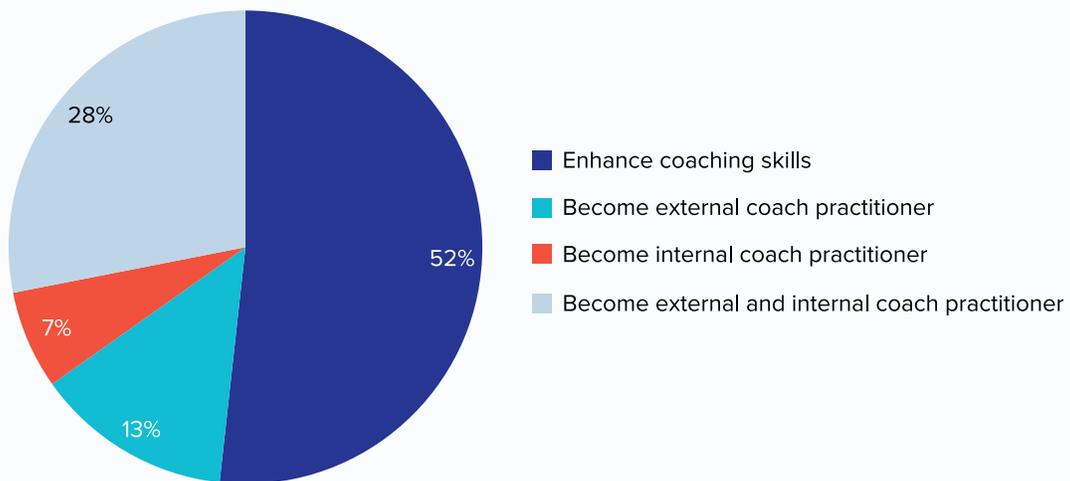
Among those planning to enroll in additional training, a little over one in two (52%) said they wanted to enhance their coaching skills. The remaining 48% said they wanted to become a coach practitioner, with most intending to become a hybrid external and internal coach practitioner.

The proportion planning to enroll in additional training ranged from 82% in Asia to 65% in Latin America and the Caribbean.

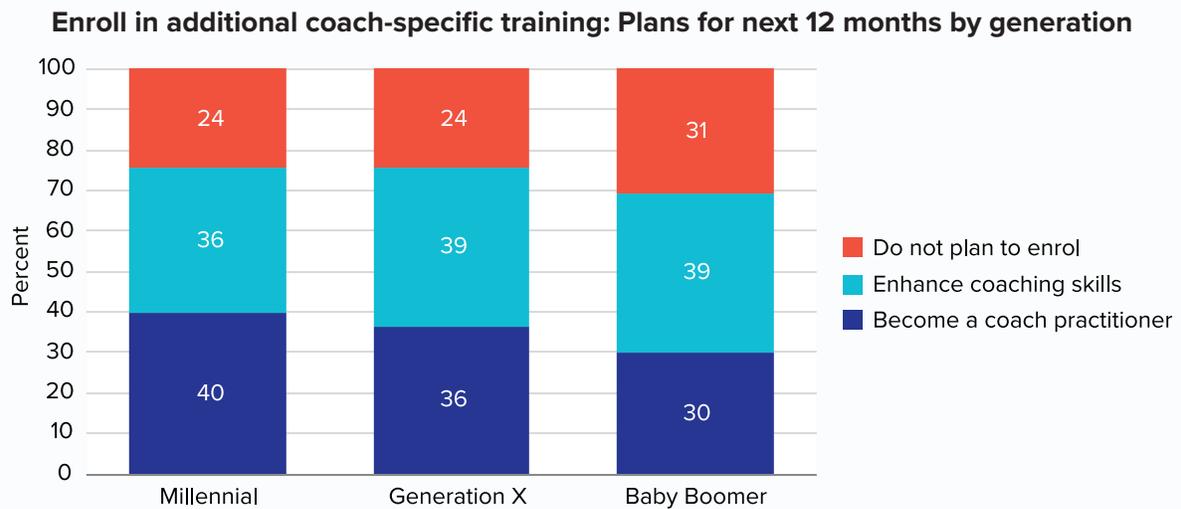
Enroll in additional coach-specific training: Plans for next 12 months by region



Managers/leaders planning to enroll in additional training: Purpose



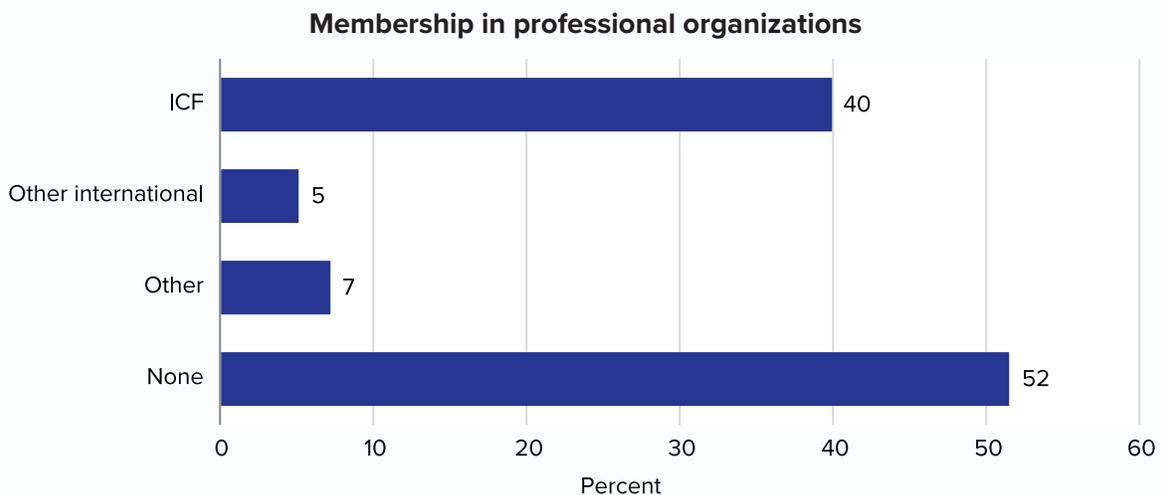
Millennials were most likely to say they plan on enrolling in additional training to become a coach practitioner (40%).



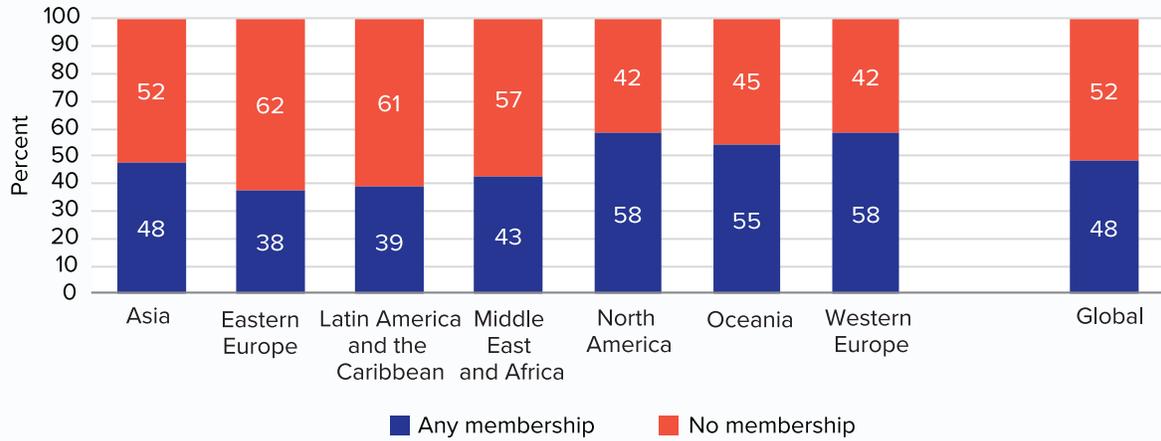
Membership in coaching organizations

Almost one in two managers/leaders (48%) are members of professional organizations. The proportion has changed only slightly from 47% in 2015.

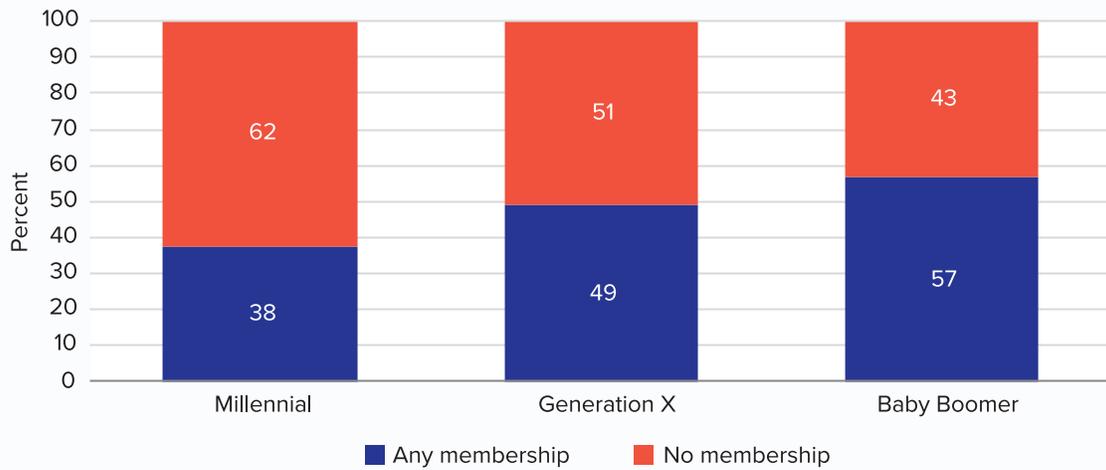
The majority of those with membership are ICF members. As outlined in the Technical Appendix, the ICF Member database was the primary means of contacting potential survey respondents. The ICF share of survey respondents will reflect that element of the survey methodology.



Membership in professional organizations by region

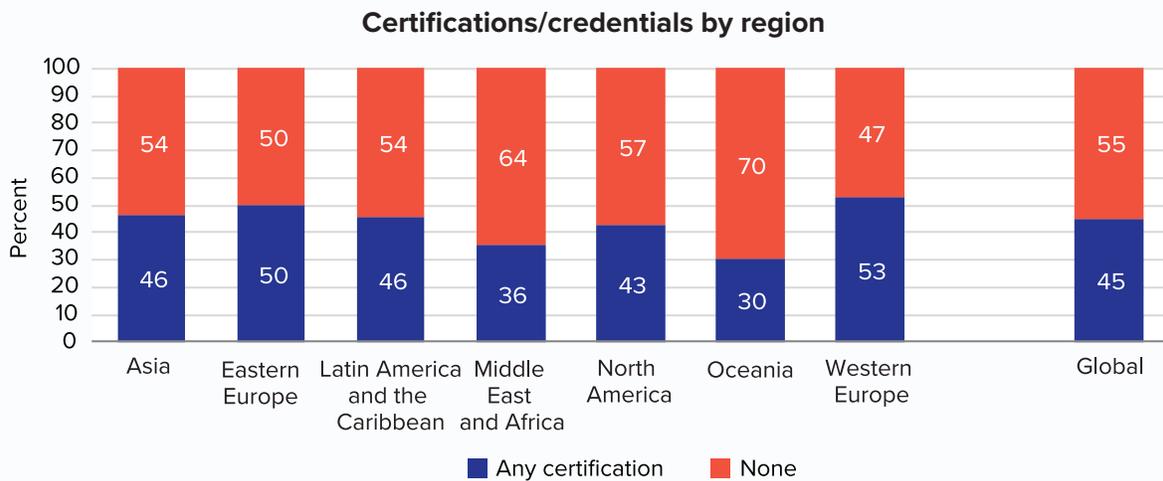
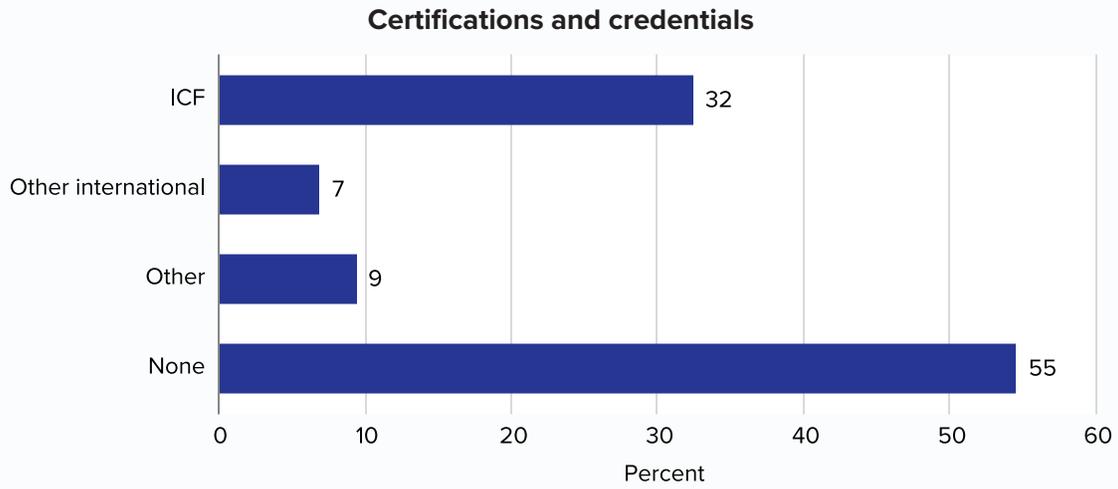


Membership in professional organizations by generation



Certifications/credentials from coaching organizations

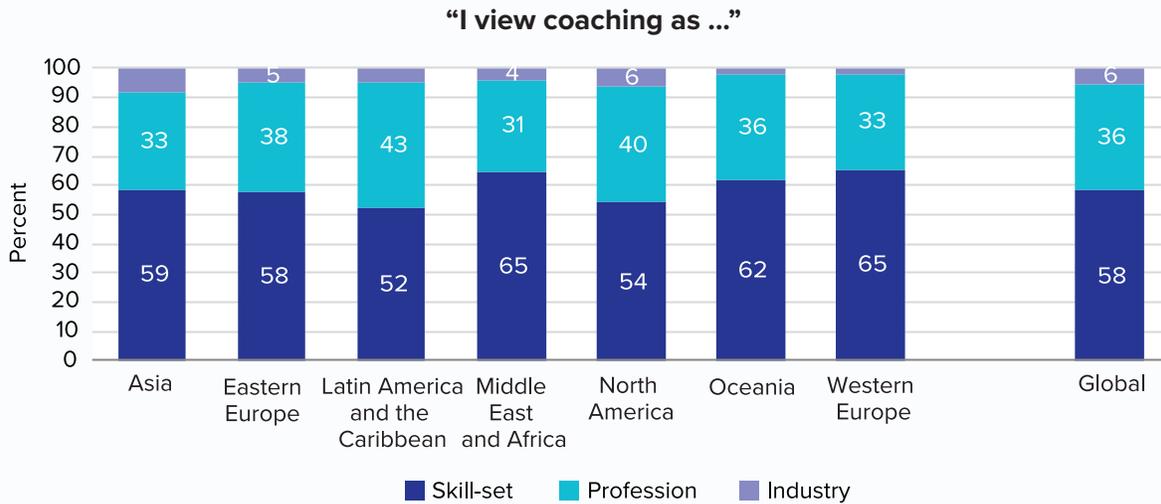
The proportion of managers/leaders with a coaching certification or credential from a coaching organization increased from 43% in 2015 to 45% in 2019.



KEY ISSUES AND FUTURE TRENDS

Views on coaching

Perspectives on coaching differ across the regions. Almost two in three (65%) managers/leaders in Western Europe and the Middle East and Africa consider coaching to be a skillset. In Latin America and the Caribbean 43% view coaching as a profession.



Managers/leaders’ views on coaching are linked to their uptake of training as well as membership in professional organizations and whether they hold any coaching certifications/credentials.

- The proportion viewing coaching as a profession ranges from 27% among those with 1–30 hours training to 42% with 200-plus hours of training.
- 42% of managers/leaders who are members of a professional coaching organization consider coaching to be a profession compared with 36% of those with no membership.
- Similarly, 42% of those with a certification/credential from a coaching organization view coaching as a profession versus 36% of those who do not have such a certification/credential.

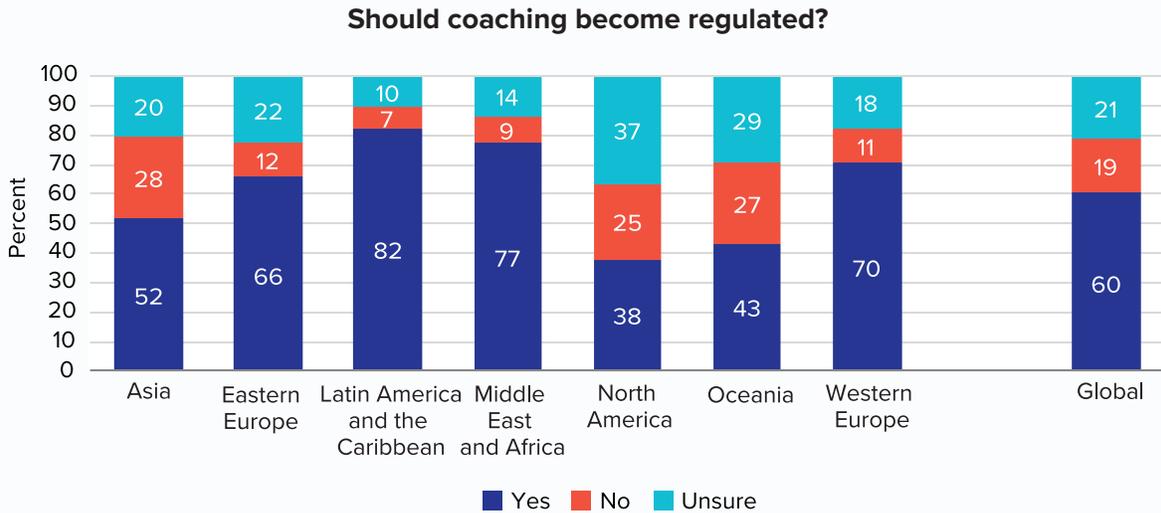


The proportion viewing coaching as a profession ranges from 27% among those with 1–30 hours training to 42% with 200-plus hours of training.

Should coaching become regulated?

Managers/leaders are increasingly of the view that coaching should become regulated. In 2019, 60% agreed that it should be regulated, up from 54% in 2015.

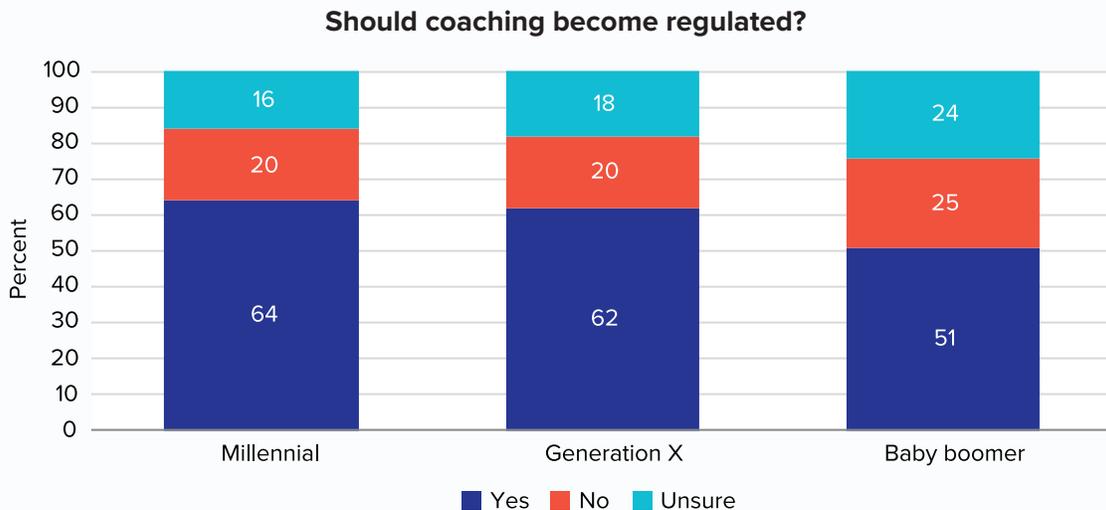
Nonetheless, there remain wide differences across the regions in the proportion favoring regulation, from 38% in North America to 82% in Latin America and the Caribbean.



Younger managers/leaders are likely to agree that coaching should be regulated. Sixty-four percent of Millennials agree that coaching should be regulated compared with 51% of Baby Boomers.

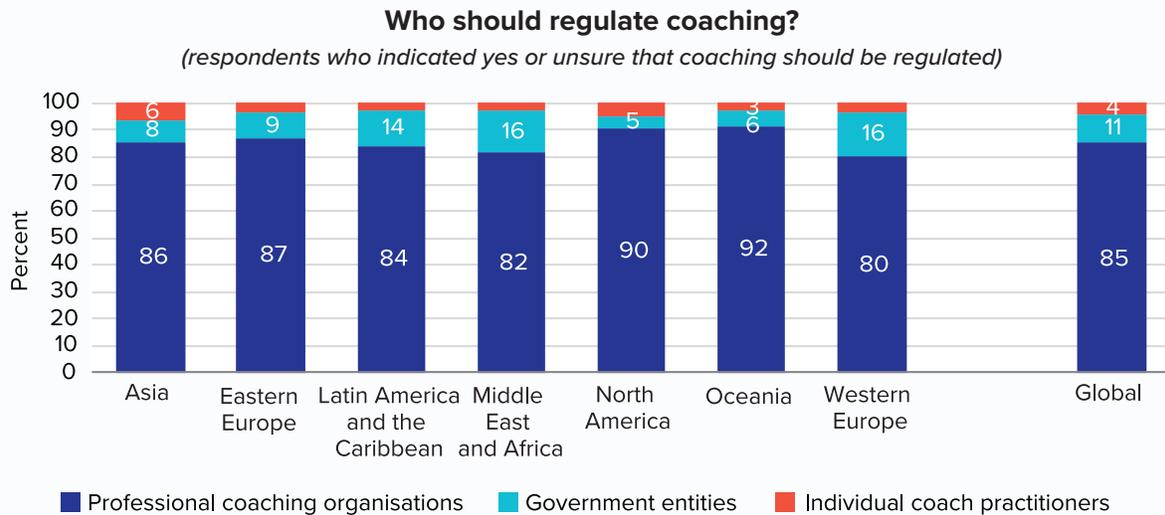
The proportion in favor also varies with:

- **Views on coaching** – 67% of those who see coaching as a profession compared with 57% who consider coaching to be a skillset
- **Being certified/credentialed** – 66% of managers/leaders with a certification/credential favor regulation versus 56% of those who are not certified/credentialed



Who should regulate?

Among those who consider coaching should be regulated or are unsure, there is overwhelming agreement that professional coaching associations should perform the regulatory role.



Obstacles to building a strong coaching culture inside an organization

Survey respondents were asked what they perceive to be the top three potential obstacles to building a strong coaching culture inside an organization. The top three obstacles identified were:

- Limited support from senior leaders (50%).
- Inability to measure impact of coaching (42%).
- Lack of budget for coaching activities (38%).

Obstacles to building a strong coaching culture within an organization

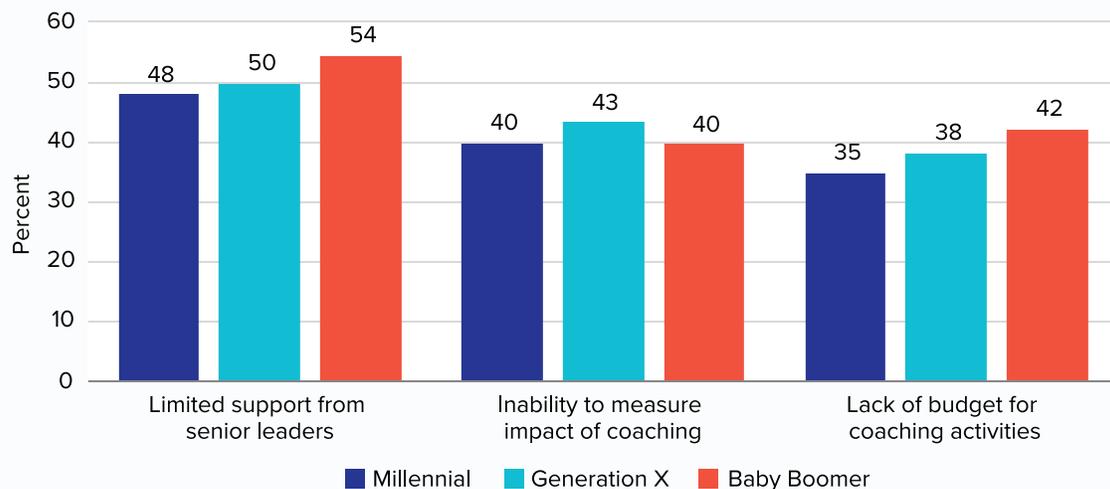


There was a considerable degree of consensus across all main demographics and by region regarding the top three obstacles.

Some slight variations in ranking and weighting were apparent by age generation, gender and region:

- Limited support from senior leaders was cited by 54% of Baby Boomers compared with 48% of Millennials.
- Men and women did not differ in their ranking of the top three obstacles, but females were slightly more likely to emphasize lack of budget for coaching activities (40% of females compared to 34% of males).
- In Latin America and the Caribbean, lack of budget for coaching activities (38%) ranked higher than inability to measure impact of coaching (31%).
- In North America, 46% listed lack of budget as an obstacle, slightly ahead of the 42% citing inability to measure impact.

Obstacles to building a strong coaching culture within an organization, by generation



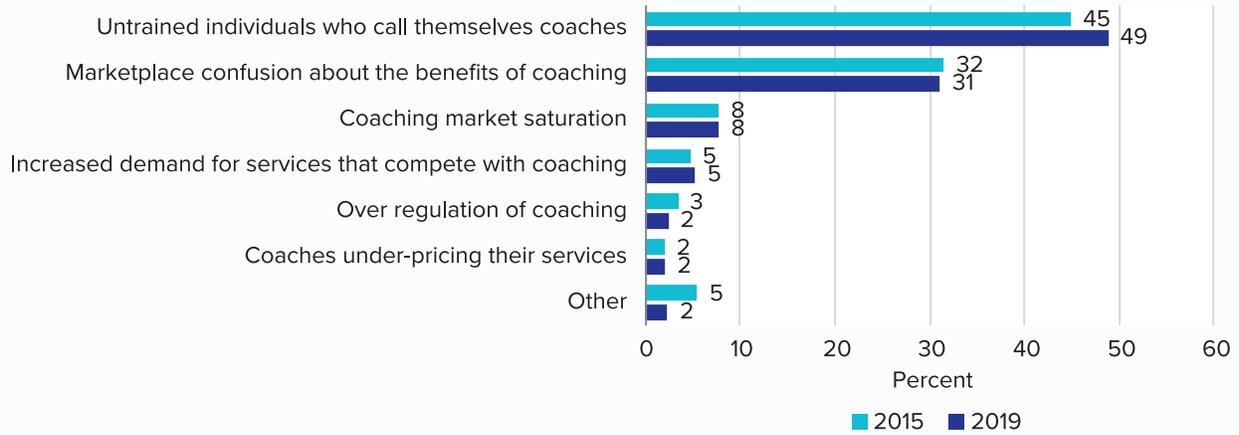
There was a considerable degree of consensus across all main demographics and by region regarding the top three obstacles.

Obstacles to coaching over next 12 months

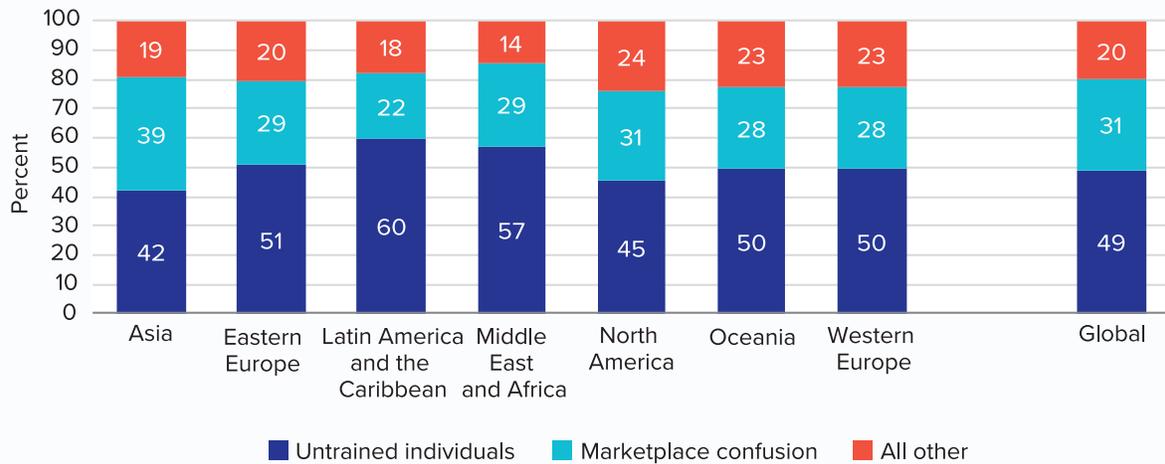
Respondents to the 2019 survey were asked to say what they believe to be the biggest obstacle for coaching in the next 12 months. It should be emphasized that the survey was undertaken prior to the coronavirus pandemic and the results should be viewed within that context.

As in 2015, the main obstacle identified was untrained individuals who call themselves coaches.

Obstacles for coaching over next 12 months

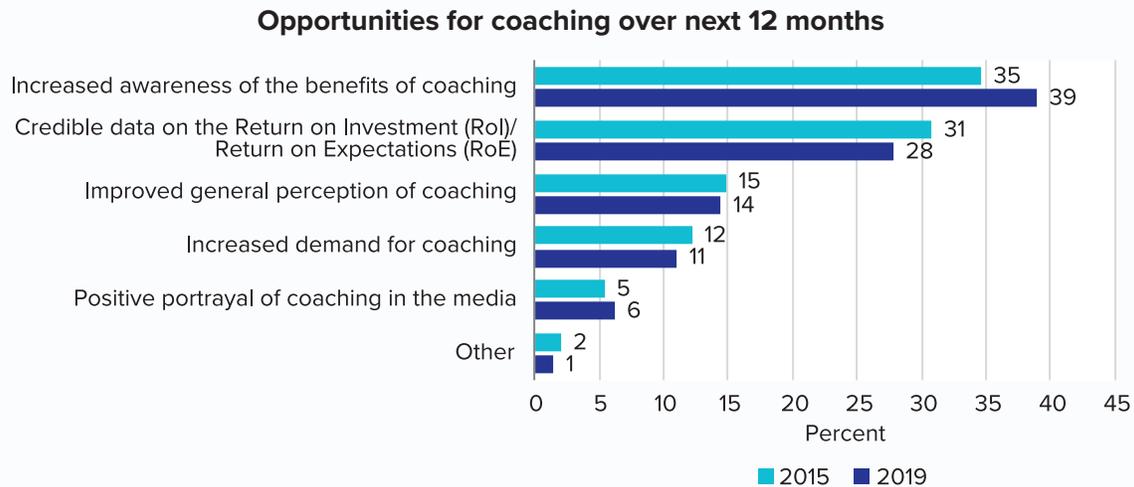


Obstacles for coaching over next 12 months by region

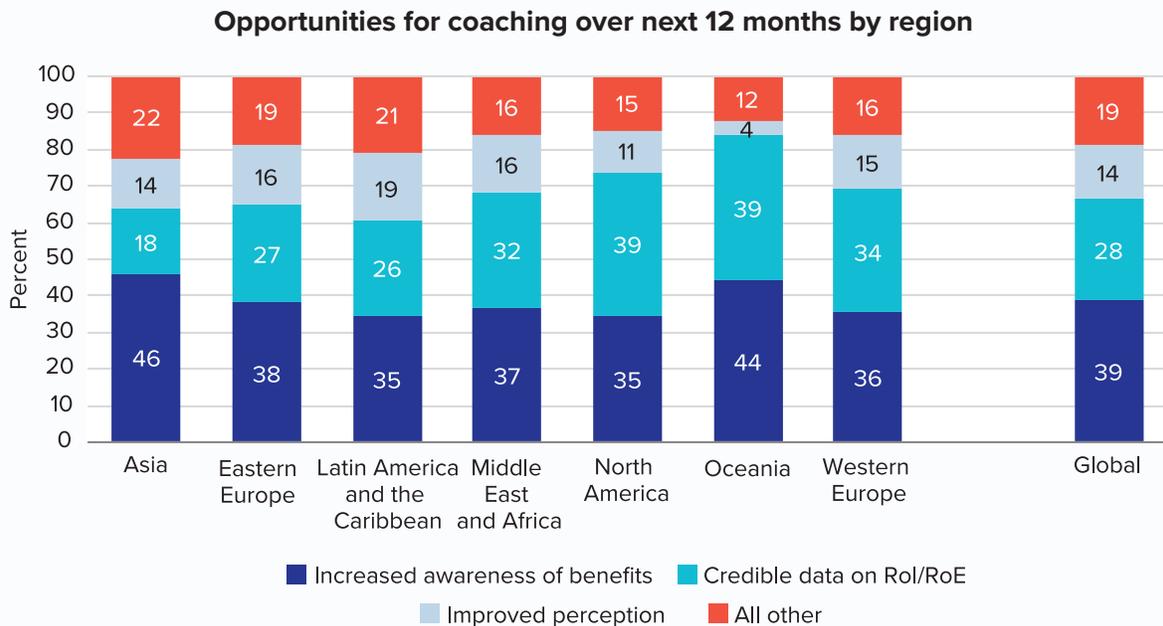


Opportunities for coaching over next 12 months

When asked about the biggest opportunity for coaching over the next 12 months, respondents most frequently cited increased awareness of the benefits of coaching (39%) and credible data on the Return on Investment (ROI)/Return on Expectations (ROE) (28%).



Regional differences are apparent in managers/leaders views on opportunities in the next 12 months. In Asia, almost one in two (46%) felt that the main opportunity is around increased awareness of benefits of coaching. In North America, respondents placed greater emphasis on credible data on ROI/ROE.





Section 6: Data Tables

DEMOGRAPHICS

Table 6.1 Gender

| | Coach practitioner | | | | Uses coaching skills | | Global |
|------------------------|--------------------|--------------|--------------|--------------------|---------------------------------|------------------|---------------|
| | External | Internal | Both | No longer coaching | HR / talent development manager | Manager / leader | |
| | % | % | % | % | % | % | |
| Female | 71.2 | 68.9 | 67.2 | 60.2 | 75.3 | 63.0 | 69.9 |
| Male | 28.6 | 31.0 | 32.5 | 37.5 | 24.5 | 36.9 | 29.9 |
| Gender-neutral | 0.2 | 0.1 | 0.3 | 2.3 | 0.2 | 0.2 | 0.2 |
| <i>Respondent Base</i> | <i>14,330</i> | <i>1,006</i> | <i>3,145</i> | <i>128</i> | <i>1,578</i> | <i>2,270</i> | <i>22,457</i> |

Table 6.2 Age

| | Coach practitioner | | | | Uses coaching skills | | Global |
|------------------------|--------------------|--------------|--------------|--------------------|---------------------------------|------------------|---------------|
| | External | Internal | Both | No longer coaching | HR / talent development manager | Manager / leader | |
| | % | % | % | % | % | % | |
| 30 years and under | 1 | 3 | 2 | 5 | 3 | 3 | 2 |
| 31 to 34 years | 3 | 5 | 6 | 5 | 8 | 8 | 4 |
| 35 to 39 years | 7 | 11 | 12 | 13 | 19 | 15 | 10 |
| 40 to 44 years | 12 | 13 | 16 | 9 | 20 | 18 | 14 |
| 45 to 49 years | 17 | 19 | 18 | 12 | 20 | 19 | 17 |
| 50 to 54 years | 18 | 18 | 17 | 14 | 14 | 16 | 17 |
| 55 to 59 years | 17 | 16 | 15 | 9 | 10 | 11 | 16 |
| 60 to 64 years | 13 | 10 | 9 | 16 | 5 | 7 | 11 |
| 65 years and over | 12 | 5 | 5 | 17 | 2 | 4 | 9 |
| <i>Respondent Base</i> | <i>14,330</i> | <i>1,006</i> | <i>3,145</i> | <i>128</i> | <i>1,578</i> | <i>2,270</i> | <i>22,457</i> |

Table 6.3 Education

| | Coach practitioner | | | | Uses coaching skills | | Global |
|--|--------------------|----------|-------|--------------------|---------------------------------|------------------|--------|
| | External | Internal | Both | No longer coaching | HR / talent development manager | Manager / leader | |
| | % | % | % | % | % | % | |
| Primary (completed before university) | 6 | 8 | 7 | 11 | 4 | 6 | 6 |
| Secondary (holds a bachelor's degree) | 31 | 34 | 33 | 39 | 31 | 36 | 32 |
| Third level (holds a more advanced degree) | 63 | 58 | 60 | 50 | 65 | 58 | 62 |
| <i>Respondent Base</i> | 14,330 | 1,006 | 3,145 | 128 | 1,578 | 2,270 | 22,457 |

Table 6.4 Years coaching: Coach practitioners

| | External | Internal | Both | Global |
|------------------------|----------|----------|-------|--------|
| | % | % | % | % |
| Less than 1 year | 7 | 8 | 7 | 7 |
| 1 to 2 years | 15 | 23 | 21 | 16 |
| 3 to 4 years | 16 | 22 | 20 | 17 |
| 5 to 10 years | 34 | 32 | 34 | 34 |
| More than 10 years | 28 | 14 | 18 | 26 |
| <i>Respondent Base</i> | 14,330 | 1,006 | 3,145 | 18,481 |

TRAINING AND CREDENTIALING

Table 6.5 To what extent do you agree or disagree that the people and organizations who receive/ use coaching expect their coaches to be certified/credentialed?

| | Coach practitioner | | | | Uses coaching skills | | Global |
|----------------------------|--------------------|--------------|--------------|--------------------|---------------------------------|------------------|---------------|
| | External | Internal | Both | No longer coaching | HR / talent development manager | Manager / leader | |
| | % | % | % | % | % | % | |
| Strongly agree | 44 | 48 | 52 | 55 | 53 | 56 | 47 |
| Somewhat agree | 37 | 36 | 32 | 24 | 31 | 29 | 35 |
| Neither agree nor disagree | 11 | 8 | 9 | 9 | 10 | 10 | 10 |
| Somewhat disagree | 6 | 5 | 5 | 4 | 5 | 4 | 6 |
| Strongly disagree | 2 | 2 | 1 | 7 | 1 | 1 | 2 |
| <i>Respondent Base</i> | <i>14,330</i> | <i>1,006</i> | <i>3,145</i> | <i>128</i> | <i>1,578</i> | <i>2,270</i> | <i>22,457</i> |

Table 6.6 Which of the following best describes your experience completing coach-specific training?

| | Coach practitioner | | | | Uses coaching skills | | Global |
|--|--------------------|--------------|--------------|--------------------|---------------------------------|------------------|---------------|
| | External | Internal | Both | No longer coaching | HR / talent development manager | Manager / leader | |
| | % | % | % | % | % | % | |
| Yes - Accredited/approved by a professional coaching organization | 85 | 80 | 85 | 75 | 71 | 71 | 83 |
| Yes - Not accredited/ approved by a professional coaching organization | 4 | 4 | 3 | 4 | 6 | 5 | 4 |
| Yes - University-based program, accredited/ approved | 7 | 10 | 9 | 7 | 7 | 8 | 8 |
| Yes - University-based program, not accredited/ approved | 2 | 2 | 1 | 2 | 2 | 2 | 2 |
| Yes - Employer-developed training | 0 | 3 | 1 | 2 | 7 | 7 | 2 |
| No coach-specific training | 0 | 1 | 0 | 10 | 6 | 7 | 2 |
| <i>Respondent Base</i> | <i>14,330</i> | <i>1,006</i> | <i>3,145</i> | <i>128</i> | <i>1,578</i> | <i>2,270</i> | <i>22,457</i> |

**Table 6.7 All with coach-specific training:
Approximately how many hours of coach-specific training have you received?**

| | Coach practitioner | | | | Uses coaching skills | | Global |
|------------------------|--------------------|------------|--------------|--------------------|---------------------------------|------------------|---------------|
| | External | Internal | Both | No longer coaching | HR / talent development manager | Manager / leader | |
| | % | % | % | % | % | % | % |
| 1-30 hours | 1 | 5 | 2 | 4 | 10 | 11 | 3 |
| 31-59 hours | 3 | 8 | 5 | 10 | 12 | 10 | 5 |
| 60-124 hours | 24 | 35 | 29 | 26 | 35 | 31 | 26 |
| 125-199 hours | 27 | 25 | 26 | 20 | 21 | 20 | 26 |
| 200 hours or more | 45 | 26 | 38 | 40 | 21 | 27 | 40 |
| <i>Respondent Base</i> | <i>14,220</i> | <i>974</i> | <i>3,121</i> | <i>114</i> | <i>1,424</i> | <i>2,112</i> | <i>21,965</i> |

KEY ISSUES AND FUTURE TRENDS

Table 6.8 Views coaching as ...

| | Coach practitioner | | | | Uses coaching skills | | Global |
|------------------------|--------------------|--------------|--------------|--------------------|---------------------------------|------------------|---------------|
| | External | Internal | Both | No longer coaching | HR / talent development manager | Manager / leader | |
| | % | % | % | % | % | % | |
| Industry | 6 | 5 | 6 | 8 | 6 | 5 | 6 |
| Profession | 70 | 53 | 62 | 42 | 37 | 36 | 62 |
| Skill-set | 24 | 42 | 32 | 50 | 57 | 59 | 32 |
| <i>Respondent Base</i> | <i>14,330</i> | <i>1,006</i> | <i>3,145</i> | <i>128</i> | <i>1,578</i> | <i>2,270</i> | <i>22,457</i> |

Table 6.9 Should coaching become regulated?

| | Coach practitioner | | | | Uses coaching skills | | Global |
|------------------------|--------------------|------------|--------------|--------------------|---------------------------------|------------------|---------------|
| | External | Internal | Both | No longer coaching | HR / talent development manager | Manager / leader | |
| | % | % | % | % | % | % | |
| Yes | 56 | 54 | 61 | 69 | 60 | 60 | 57 |
| No | 19 | 20 | 15 | 14 | 17 | 20 | 19 |
| Unsure | 25 | 27 | 24 | 17 | 22 | 20 | 24 |
| <i>Respondent Base</i> | <i>13,664</i> | <i>953</i> | <i>2,980</i> | <i>128</i> | <i>1,578</i> | <i>2,270</i> | <i>21,573</i> |

Table 6.10 Who would be best to regulate the coaching industry? All saying 'Yes' or 'Unsure' when asked if coaching should become regulated

| | Coach practitioner | | | | Uses coaching skills | | Global |
|-------------------------------------|--------------------|------------|--------------|--------------------|---------------------------------|------------------|---------------|
| | External | Internal | Both | No longer coaching | HR / talent development manager | Manager / leader | |
| | % | % | % | % | % | % | |
| Government entities | 13 | 10 | 12 | 17 | 10 | 11 | 12 |
| Professional coaching organizations | 82 | 86 | 83 | 78 | 86 | 84 | 83 |
| Individual coach practitioners | 5 | 4 | 5 | 5 | 4 | 4 | 5 |
| <i>Respondent Base</i> | <i>10,996</i> | <i>767</i> | <i>2,534</i> | <i>110</i> | <i>1,305</i> | <i>1,826</i> | <i>17,538</i> |

Table 6.11 What do you perceive to be the top three potential obstacles to building a strong coaching culture inside an organization?

| | Coach practitioner | | | | Uses coaching skills | | Global |
|---|--------------------|------------|--------------|--------------------|---------------------------------|------------------|---------------|
| | External | Internal | Both | No longer coaching | HR / talent development manager | Manager / leader | |
| | % | % | % | % | % | % | |
| Limited support from senior leaders | 53 | 48 | 48 | 45 | 52 | 49 | 52 |
| Lack of budget for coaching activities | 46 | 39 | 45 | 44 | 40 | 37 | 44 |
| Inability to measure impact of coaching | 38 | 49 | 41 | 30 | 44 | 40 | 40 |
| Poor stakeholder communication about coaching | 32 | 25 | 33 | 33 | 27 | 30 | 32 |
| Inability to tie coaching to organization's strategy | 29 | 26 | 29 | 27 | 29 | 28 | 29 |
| Inability to change organizational culture | 25 | 24 | 25 | 23 | 25 | 26 | 25 |
| Lack of time to organize the coaching | 16 | 22 | 19 | 16 | 20 | 23 | 18 |
| Concerns over individual/organizational confidentiality | 14 | 17 | 17 | 19 | 18 | 18 | 16 |
| Inability to standardize/centralize the coaching | 9 | 14 | 12 | 14 | 14 | 15 | 11 |
| Other | 7 | 7 | 6 | 5 | 5 | 5 | 7 |
| Don't know | 4 | 3 | 2 | 5 | 1 | 2 | 4 |
| <i>Respondent Base</i> | <i>13,612</i> | <i>949</i> | <i>2,965</i> | <i>128</i> | <i>1,578</i> | <i>2,270</i> | <i>21,502</i> |

(Up to three responses – column percent may add to more than 100)

Table 6.12 What do you believe to be the biggest obstacle for coaching over the next 12 months?

| | Coach practitioner | | | | Uses coaching skills | | Global |
|--|--------------------|----------|-------|--------------------|---------------------------------|------------------|--------|
| | External | Internal | Both | No longer coaching | HR / talent development manager | Manager / leader | |
| | % | % | % | % | % | % | |
| Untrained individuals who call themselves coaches | 48 | 47 | 54 | 43 | 51 | 47 | 49 |
| Marketplace confusion about the benefits of coaching | 27 | 28 | 26 | 29 | 28 | 33 | 28 |
| Coaching market saturation | 10 | 10 | 8 | 12 | 9 | 7 | 9 |
| Increased demand for services that compete with coaching | 4 | 6 | 4 | 6 | 6 | 5 | 4 |
| Coaches under-pricing their services | 5 | 3 | 3 | 4 | 2 | 2 | 4 |
| Over regulation of coaching | 1 | 3 | 2 | 3 | 3 | 2 | 2 |
| Other | 5 | 4 | 3 | 3 | 2 | 2 | 4 |
| <i>Respondent Base</i> | 13,593 | 947 | 2,955 | 128 | 1,578 | 2,270 | 21,471 |

Table 6.13 What do you believe to be the biggest opportunity for coaching over the next 12 months?

| | Coach practitioner | | | | Uses coaching skills | | Global |
|--|--------------------|----------|-------|--------------------|---------------------------------|------------------|--------|
| | External | Internal | Both | No longer coaching | HR / talent development manager | Manager / leader | |
| | % | % | % | % | % | % | |
| Increased awareness of the benefits of coaching | 36 | 36 | 37 | 24 | 35 | 41 | 37 |
| Credible data on the Return on Investment (RoI)/Return on Expectations (RoE) from coaching | 28 | 28 | 29 | 27 | 33 | 24 | 28 |
| Improved general perception of coaching | 15 | 16 | 14 | 23 | 14 | 15 | 15 |
| Increased demand for coaching | 11 | 12 | 11 | 8 | 11 | 11 | 11 |
| Positive portrayal of coaching in the media | 7 | 6 | 7 | 13 | 6 | 7 | 7 |
| Other | 3 | 2 | 2 | 5 | 1 | 2 | 2 |
| <i>Respondent Base</i> | 13,573 | 946 | 2,951 | 128 | 1,578 | 2,270 | 21,446 |



Section 7: Technical Appendix

INTRODUCTION

This section presents the approach to the *2019 ICF Global Coaching Study*, under the following headings:

- Questionnaire design
- Definitions
- Survey fieldwork
- Survey outcomes
- Quantitative indicators
- Number of coaches: Estimation
- Number of coaches: Membership ratio method
- Secondary data sources
- Comparability

Questionnaire Design

The questionnaire used for the 2019 study is very similar to the instrument employed for the 2011 and 2015 *ICF Global Coaching Studies*, facilitating comparisons across a wide range of topics.

The first set of questions is designed to screen in only those who consider themselves to be coach practitioners or managers/leaders using coaching skills.

For that purpose, respondents were first asked if they considered themselves to be a professional coach. All survey respondents were then asked to describe which of the following best describes what they primarily do:

- External coach practitioner
- Internal coach practitioner
- Both an external coach practitioner and an internal coach practitioner
- No longer coaching at this time and do not plan to coach in the future
- A human resources/talent development manager/director who uses coaching skills
- A manager/leader who uses coaching skills
- None of the above

No further questions were asked of those who responded with “None of the above.”

The remainder of the questionnaire is organized into four main sections:

The coach. Following the screening questions, the first set of questions asked all respondents to provide information relating to their location, age, education, coach-specific training, coaching association membership and coaching credentials. Respondents who self-identified as coach practitioners were asked a number of additional questions, including the number of years they have been working as a coach and their main coaching specialty. Those saying they offer additional services were also asked to give their allocation of time between coaching and other services they offer. Active coach practitioners were asked about their hours per week working as a coach.

The client. This second set of questions, posed only to active coach practitioners, sought information on attributes of the people to whom they provide coaching services. This included titles/positions held by clients, number of active clients and a demographic profile of clients by age and gender. The section also asked coach practitioners about their engagements, including the duration of coaching engagements, the length of coaching sessions and mode of contact with clients.

The size of the profession. This section asked active coach practitioners to provide details of their annual revenue or income generated by coaching only, the average fee for a one-hour coaching session, and key revenue trends over the last 12 months (in numbers of clients, average fees, coaching sessions and annual revenue/income). Coach practitioners were also asked to say how they expect these same key indicators would evolve over the next 12 months.

Key issues facing the industry. The final section sought the views of all respondents on a range of issues that may affect the future direction of the profession. This included whether coaching should be regulated, the obstacles and opportunities facing coaching over the next 12 months, and potential obstacles to building a strong coaching culture inside an organization.

Definitions

To ensure a consistent approach to the survey questions, the following definitions were presented to the survey respondents in a glossary and also prompted with hover buttons at appropriate stages in the survey:

Accredited coach training program – any program consisting of coach-specific training that has met the rigid criteria required to be approved by a professional coaching organization

Active client – any client to whom the coach is providing coaching services to at this time

Client – the person who is being coached

Coaching - partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential

Coach practitioner – someone who provides an ongoing partnership designed to help clients produce fulfilling results in their personal and professional lives. The coach's job is to provide support to enhance the skills, resources and creativity that the client already has.

Coaching sponsor – the organization or individual paying for the client's coaching

Coach-specific training – training that teaches coaching skills and/or how to apply technical skills in a coach-like manner and encompasses theories and core coaching competencies designed to prepare an individual to practice as a professional coach

External coach – a professional coach practitioner, who is either self-employed or partners with other professional coaches, to form a coaching business

Internal coach – a professional coach practitioner, who is employed within an organization and has specific coaching responsibilities identified in his or her job description

Manager/leader using coaching skills – a manager or leader who works with his or her subordinates within the organization to create awareness and support behavior change. This is accomplished using coaching knowledge, approaches and skills

Survey Fieldwork

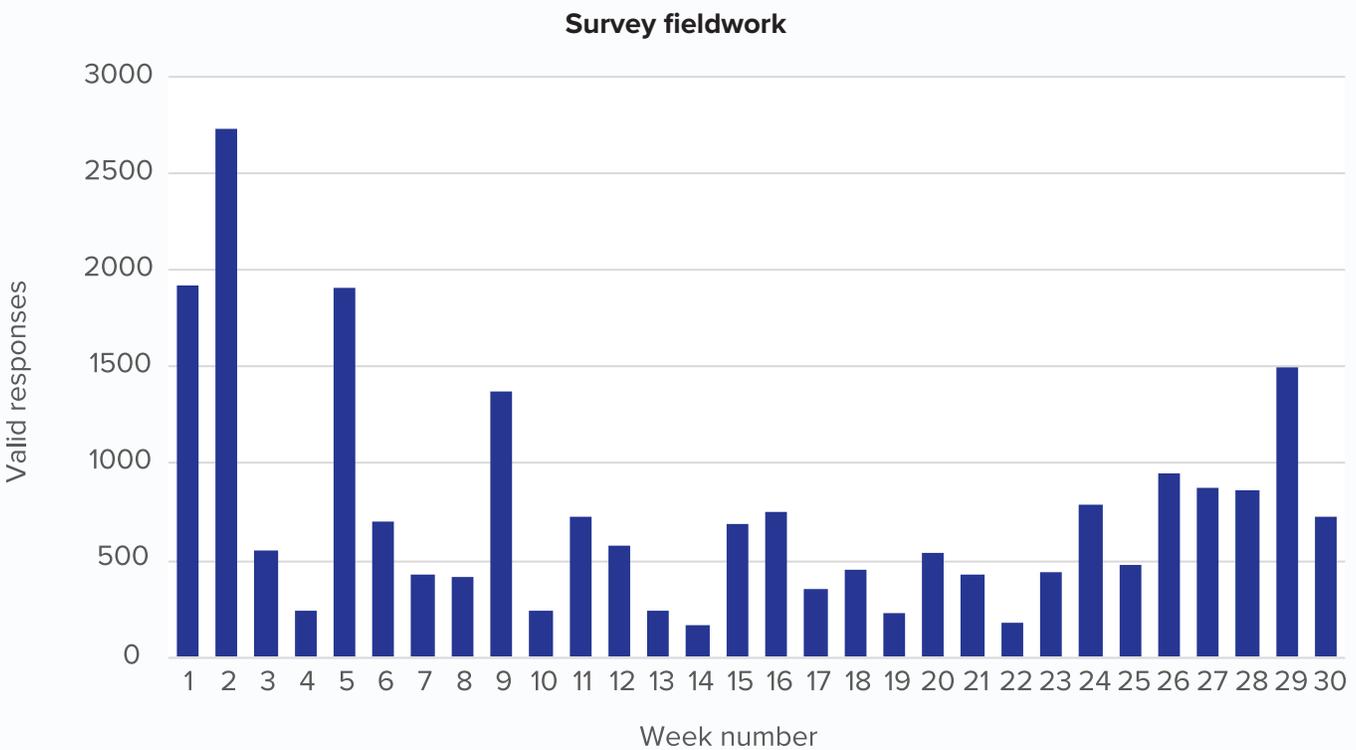
The updated global survey was launched online in May 2019. Several approaches were deployed to reach out and engage worldwide with coach practitioners and managers/leaders using coaching skills.

First, ICF's extensive contact lists were used to circulate personalized invitations and survey links. In addition to current ICF members, invitations to participate in the survey were sent to non-members holding ICF credentials, expired ICF members and other databases existing within ICF, such as inquiries regarding membership, credentialing/certification and location of ICF chapters.

Second, ICF members were asked to share a generic link to the online survey registration site with their professional networks, with the intention of initiating a "snowball" effect that would attract even more non-ICF coaches and managers/leaders using coaching skills.

Third, the survey was implemented to ensure that it was readily accessible to all potential respondents. Thus, the survey was made available online in nine languages: English, French, German, Italian, Japanese, Korean, Mandarin, Portuguese and Spanish. Also, the survey was designed so that it could be completed using a range of mobile devices.

Over the six-month survey fieldwork period, concluding in December 2019, global reminders were issued on a regular basis to those in the ICF contacts database who had yet to complete the survey. Coaches who joined ICF after the initial launch were also invited to participate through the monthly global reminder campaign.



Survey Outcomes

A total of 26,851 individuals registered online to take part in the survey. Of these, 22,457 (84%) provided valid responses. A valid response was required to meet each of the following conditions:

- The respondent identified as a coach practitioner or a manager/leader using coaching skills. The screening question was located at the start of the questionnaire.
- The respondent completed the questionnaire in full (21,312 responses) or completed at least the first section of the questionnaire (1,145 responses).

Of the 22,457 valid responses, 18,609 (83%) were provided by coach practitioners and 3,848 (17%) from managers/leaders using coaching skills.

Respondents who identified themselves as ICF members accounted for 15,300 responses, representing 68% of the total.

Regional Classification

Respondents from 161 countries and territories submitted valid responses, up from 137 in the 2015 study and 117 in the 2011 study. More than 100 survey returns were received from 52 countries and territories, up from 40 in the 2015 study.

Geographical spread of survey returns for the 2019 ICF Global Coaching Study

| Survey returns | 2019 Countries and Territories | 2015 Countries and Territories | 2011 Countries and Territories |
|----------------|--------------------------------|--------------------------------|--------------------------------|
| 100+ | 52 | 40 | 31 |
| 50-99 | 8 | 8 | 7 |
| Fewer than 50 | 101 | 89 | 79 |
| Total | 161 | 137 | 117 |



Of the 22,457 valid responses, 18,609 (83%) were provided by coach practitioners and 3,848 (17%) from managers/leaders using coaching skills.

For reporting purposes, the 161 participating countries and territories were classified into seven world regions. The classifications were designed both to reflect geographical proximity and to ensure sample bases were large enough for detailed statistical analysis. The seven world regions are as follows:

| Region | Comprises | Number of responses | % of responses |
|---------------------------------|---|---------------------|----------------|
| Asia | The continent of Asia, except those countries and territories classified to Eastern Europe and the Middle East and Africa regions | 3,194 | 14 |
| Latin America and the Caribbean | South America, Central America and the Caribbean (including Puerto Rico, on the basis of its central location in the Caribbean) | 3,281 | 15 |
| Middle East and Africa | The continent of Africa plus the Gulf States | 1,386 | 6 |
| North America | USA and Canada | 7,406 | 33 |
| Oceania | Based on the United Nations classification. Mainly Australia and New Zealand, including also the Pacific Island groupings of Melanesia, Micronesia and Polynesia | 825 | 4 |
| Western Europe | Bounded to the east by Germany and Austria, with Finland included in this grouping to preserve the Nordic cluster | 4,848 | 22 |
| Eastern Europe | The remainder of continental Europe and Russia. This region includes also a number of countries and territories which are geographically part of the continent of Asia (e.g. Turkey, Armenia, Azerbaijan, Georgia), but which have various political and cultural links to Europe (e.g., membership in the Council of Europe and also UEFA, the European football association) | 1,517 | 7 |
| All | | 22,457 | 100 |

Valid survey responses by ICF membership

| Region | All | | ICF members | | Non-ICF members | |
|---------------------------------|---------------|-------------|---------------|-------------|-----------------|-------------|
| | # | % of global | # | % of global | # | % of global |
| Asia | 3,194 | 14 | 1,964 | 13 | 1,230 | 17 |
| Eastern Europe | 1,517 | 7 | 865 | 6 | 652 | 9 |
| Latin America and the Caribbean | 3,281 | 15 | 1,372 | 9 | 1,909 | 27 |
| Middle East and Africa | 1,386 | 6 | 854 | 6 | 532 | 7 |
| North America | 7,406 | 33 | 6,050 | 40 | 1,356 | 19 |
| Oceania | 825 | 4 | 606 | 4 | 219 | 3 |
| Western Europe | 4,848 | 22 | 3,589 | 23 | 1,259 | 18 |
| All | 22,457 | 100 | 15,300 | 100 | 7,157 | 100 |

Valid survey responses by type

| Region | All | | Coach practitioners | | Managers using coaching skills | |
|---------------------------------|---------------|-------------|---------------------|-------------|--------------------------------|-------------|
| | # | % of global | # | % of global | # | % of global |
| Asia | 3,194 | 14 | 2,029 | 11 | 1,165 | 30 |
| Eastern Europe | 1,517 | 7 | 1,190 | 6 | 327 | 8 |
| Latin America and the Caribbean | 3,281 | 15 | 2,598 | 14 | 683 | 18 |
| Middle East and Africa | 1,386 | 6 | 1,025 | 6 | 361 | 9 |
| North America | 7,406 | 33 | 6,691 | 36 | 715 | 19 |
| Oceania | 825 | 4 | 726 | 4 | 99 | 3 |
| Western Europe | 4,848 | 22 | 4,350 | 23 | 498 | 13 |
| All | 22,457 | 100 | 18,609 | 100 | 3,848 | 100 |

Number of Coaches: Estimation

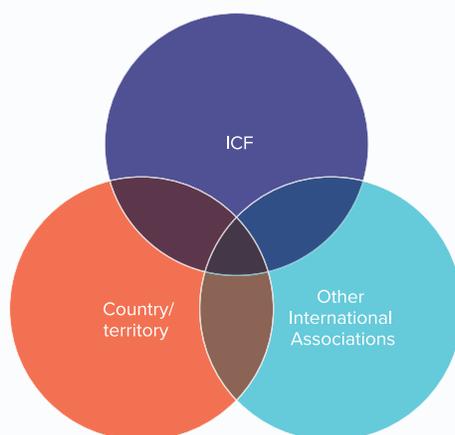
While coaching truly is a global profession, there are no definitive and accepted lists or counts of the total number of coaches, whether by country/territory, world region or world-wide.

To estimate the number of coach practitioners, one possible approach would be to compile a list of all coaching-related membership associations and obtain counts of the number of coach practitioners within each association.

As illustrated in the accompanying diagram, the totality of membership affiliations encompasses: ICF memberships; other coaching organizations with an international membership; and, organizations with a country or territory specific orientation.

This approach would encounter a number of problems, for example:

- Counting those with no professional affiliation. Not all coach practitioners belong to membership associations.
- Membership overlaps. Some coach practitioners belong to more than one association. In that instance, there is a risk of double-counting coaches with more than one membership.
- Defining the universe of coaching-related membership associations. Some associations focus exclusively on coach practitioners. Others embrace coach practitioners within a broader scope or through other organizations that intersect with coaching.



Number of Coaches: Membership Ratio Method

A second approach is to implement the membership ratio approach to the estimation problem.

Consider the situation where a random sample is taken from the population of coaches and information is obtained on membership of coaching-related associations, including overlaps and non-membership. In that circumstance, an estimate for the total number of coaches can be derived as follows.

First, obtain information on the total number of coaches within one of the sub-groupings illustrated in the membership-based framework, e.g., ICF membership or the composite other international associations. For that particular reference sub-group, the survey returns can then be scaled up to the relevant total number of memberships.

Second, from the survey data, for each other membership sub-group, calculate the ratio of survey returns from that sub-group to the number of survey returns in the reference sub-group and use that ratio to scale up to an estimate for the number of memberships in that non-reference sub-group.

Third, from the survey data, estimate the incidence of membership overlaps between population sub-groups and subtract the scaled-up number of overlaps from the membership estimates to arrive at an estimate for the number of coaches, to avoid double-counting memberships.

The approach can be illustrated with the following example. For simplicity's sake, assume there are just two membership groups, A and B. Let A be the reference group and suppose that total membership in A is 5,000. From a random sample survey, 1,000 returns are obtained from group A and 2,000 from group B. In the survey, 300 (10%) say they are members of both A and B. The ratio of memberships in B to those in A is 2:1. Applying that ratio to the total membership in A gives an estimated membership in B of 10,000 (i.e. 5,000 multiplied by 2). The combined membership total for groups A and B is then 15,000. From the survey returns, 10% are members of both A and B. Applying that proportion to the estimated total membership gives an estimated 1,500 overlaps in the population. Subtracting the overlap estimate from the 15,000 total memberships gives an estimated 13,500 coaches in the combined groups A and B.

Memberships in the Global Coaching Study

A singular advantage of the *2020 ICF Global Coaching Study* is that it is possible to map from the survey returns to the membership-based framework as a basis for estimating the total number of coaches. Specifically, information is available on membership overlaps and non-membership.

In addition to confirming ICF membership, the survey asked respondents to indicate their membership of a number of other international associations:

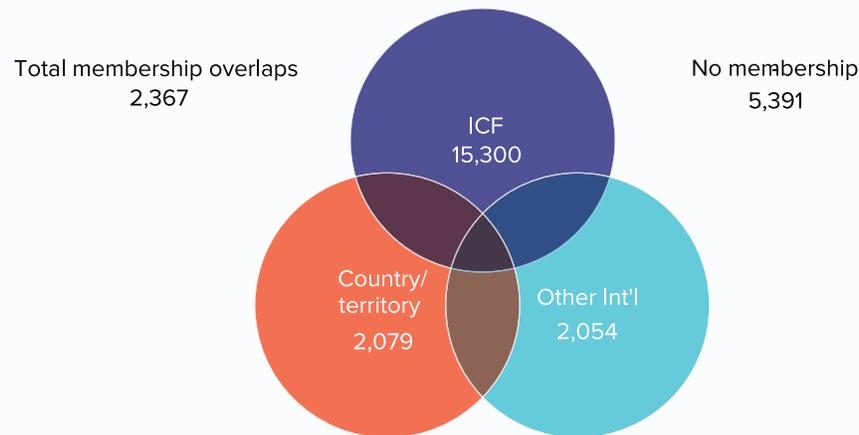
- Asia Pacific Alliance of Coaches (APAC)
- Association for Coaching (AC)
- Association for Professional Executive Coaching and Supervision (APECS)
- Coaches and Mentors of South Africa (COMENSA)
- European Mentoring and Coaching Council (EMCC)
- International Association of Coaching (IAC)
- Worldwide Association of Business Coaches (WABC)

The following organizations were also classified as international associations from the volume and spread of responses to the question asking respondents to write in their affiliation:

- Federación Internacional de Coaching Ontológico Profesional (FICOP)
- International Coaching Community (ICC)

A total of 2,054 respondents indicated membership of these other international association. Country and territory specific, regional, and various other memberships were indicated by 2,079 respondents. A total of 2,367 overlapping memberships were indicated by survey respondents. In addition, 5,391 said they were not in any association.

Memberships: Valid survey returns



Modified membership ratio method

The membership responses from the 2019 survey provide the basis for implementing the membership ratio method approach to estimating the worldwide total number of professional coaches. The key issue is the choice of a reference group.

As the ICF member count is already known (35,250), it would seem that ICF memberships should serve as the reference group. However, the survey sample is heavily skewed toward ICF members (68% of the valid responses). This naturally reflects the use of the ICF member and other datasets for contacting potential respondents and issuing periodic reminders.

Consequently, designating the ICF as the reference group would inevitably lead to an under-estimate of the required membership ratios relative to other sub-groups, thereby underestimating the total number of coaches in the population.

Nonetheless, since the ICF membership count is already known, the membership ratio method can be modified to focus on the remaining sub-groups.

From publicly available sources, it was possible to compile an estimate for the total number of memberships within the other international associations listed previously. For that reason, the combined other international associations was chosen as the reference group for the application of the ratio method, as outlined above, to estimating the number of coaches in the remaining sub-groups; i.e., country/territory/regional/other memberships, no memberships and membership not stated.

The number of coaches

The combined membership of other international associations is estimated at 25,100. Applying the survey ratios to the remaining sub-groups, the estimated grossed-up numbers of coaches in the remaining membership categories (excluding the ICF) are shown in the accompanying table.

From the survey data, the estimated number of membership overlaps is 14,170.

When the membership sub-groups are added together, and after subtracting the overlaps, it is estimated that there are presently approximately 71,600 coach practitioners worldwide.

The methodology also yields an indicative figure for 15,890 managers/leaders using coaching skills. That estimate should be viewed as strictly indicative and subject to a higher level of uncertainty than the figures for coach practitioners.

The indicative nature of the figures presented for managers/leaders using coaching skills derives from the fact that the survey data collection has relied primarily on contact lists related to coaching memberships and credentials as well as snowballing via coaching networks. Managers/leaders use coaching skills within the workplace or organizational setting. It is therefore plausible that an approach based on coaching-related lists and networks will tend to underestimate the number of managers and leaders who use coaching skills.

Estimated individuals in the coaching continuum worldwide, by membership

| | All | Coach practitioners | Managers/leaders using coaching skills |
|---------------------------------------|---------------|---------------------|--|
| | # | # | # |
| Memberships | | | |
| ICF | 35,250 | 32,190 | 3,060 |
| Other international organizations | 25,100 | 22,780 | 2,320 |
| Country/territory/other organizations | 12,220 | 10,850 | 1,370 |
| None | 29,080 | 19,000 | 10,090 |
| Overlap adjustment | -14,170 | -13,220 | -950 |
| Total | 87,480 | 71,600 | 15,890 |

Estimated individuals in the coaching continuum worldwide, by membership

| | All | Coach practitioners | Managers/leaders using coaching skills |
|---------------------------------------|------------|---------------------|--|
| | % | % | % |
| Memberships | | | |
| ICF | 40 | 45 | 19 |
| Other international organizations | 29 | 32 | 15 |
| Country/territory/other organizations | 14 | 15 | 9 |
| None | 33 | 27 | 63 |
| Overlap adjustment | -16 | -18 | -6 |
| Total | 100 | 100 | 100 |

Modified membership ratio method

The key strengths of the modified ratio method approach to estimating the number of coaches are as follows:

- The modified membership ratio method is a data-driven approach that takes account of a range of data sources
- The availability of counts from the ICF member dataset serves to confine the estimation problem to the remaining membership sub-groups
- The ICF database anchors the overall estimate in a robust membership count, with over 35,200 members estimated to account for 40% of the global total

- The large scale of the *2020 ICF Global Coaching Study*, including especially almost 7,200 responses from non-ICF members
- The ability to map from the survey returns to the membership-based framework that is required for the application of the ratio method

Taking all of the above into consideration, the figure of 71,600 would seem to be a reasonable estimate for the worldwide number of coach practitioners.

Nonetheless, it is important to recognize the uncertainties that inevitably arise with a survey-based estimation methodology, as follows:

- The estimation method depends on ratios derived from a sample survey of coaches. The survey-derived ratios will therefore be subject to variability arising from the survey process
- Reflecting the above, estimates for the number of coaches have been prepared for the world regions only and not for individual countries/territories
- The assumption that survey returns from those with a non-ICF membership status represent representative samples from the relevant sub-populations. This assumption cannot strictly be validated. However, it would not appear unreasonable. For example, the survey returns from each of the other membership sub-groups were widely dispersed geographically. Each sub-group was represented in each of the world regions. The returns from members of other international associations and those with country/territory/regional/other associations were each drawn from 98 countries and territories. For those with no membership affiliation, 128 countries and territories were represented
- The accuracy of the estimated number of coaches will in turn reflect the accuracy of the data inputs, including both the survey returns and the estimated combined memberships of other international associations. The latter were extracted from publicly available sources and should provide a reasonable guide, albeit their precision cannot be verified. This serves to further underscore the importance of the ICF member dataset as an anchor for the estimation approach.
- The estimate for the worldwide number of coaches is valid at a point in time.



... the figure of 71,600 would seem to be a reasonable estimate for the worldwide number of coach practitioners.

Quantitative indicators

The 2020 ICF Global Coaching Study sought information on four quantitative indicators (e.g. revenue, fee per one-hour coaching session, hours worked per week as a coach practitioner, and number of clients currently coaching). Information on these indicators was sought from active coach practitioners only.

Overall, the survey achieved high response rates to the quantitative indicators. Almost all active coaches gave information on clients and hours. Not unexpectedly, response rates were lower for questions relating to financial information. However, 78% of active coach practitioners supplied annual revenue/income from coaching data while 81% gave an average fee per one-hour coaching session. That level of response is high enough to ensure a representative picture.

The survey returns for each of the quantitative indicators were also subjected to rigorous quality assurance. Due to the range of currencies in a global survey, the financial information was sought both in numeric and text form. Extensive visual checks were undertaken to identify erroneous entries.

All quantitative indicators were also subjected to box plot analysis to identify data outliers, both for quality assurance purposes and to assist with the further analysis of the data.

Quantitative indicators (Base = active coach practitioners only)

| | Responses | |
|---|---------------------|---------------------|
| | Coach practitioners | % of active coaches |
| Annual revenue/income from coaching | 12,950 | 78 |
| Average fee for one-hour coaching session | 13,461 | 81 |
| Active clients | 16,421 | 99 |
| Hours per week working as a coach | 16,383 | 99 |
| Active coaches | 16,578 | 100 |

Secondary data sources

The World Bank country/territory dataset (see data.worldbank.org/) was the main source of information for the following indicators which were used in the further analysis of the survey data:

- Total population
- Exchange rates for converting revenues and fees to US dollars
- Purchasing power parity (PPP) conversion factors, defined by the World Bank as “the number of units of a country/territory’s currency required to buy the same amounts of goods and services in the domestic market as a U.S. dollar would buy in the United States”

The World Bank indicator dataset was accessed in January 2020. Data were extracted at country/territory level and aggregated to the world regional groupings outlined above.

As at January 2020, World Bank data were available on the foregoing indicators for the majority of countries and territories through 2018. Where data for a country/territory was not available through 2018, the World Bank data were updated using the relevant indicators from the International Monetary Fund (IMF) October 2019 World Economic Outlook (WEO) database (available at <https://www.imf.org/external/pubs/ft/weo/2019/02/weodata/index.aspx>).

Comparability

The following points should be noted in drawing comparisons between the 2020 study and the previous 2016 and 2012 studies.

Questionnaire design. The 2016 and 2020 studies are fully comparable in relation to the key definitions; i.e., professional coaches and the coaching continuum (coach practitioners and managers/leaders using coaching skills).

The coaching continuum definitions were first implemented in the 2016 study. Hence, the 2012 study does not contain information relating to those definitions.

All three studies employ the same definition of an active coach; i.e., with active clients at the time the survey was undertaken.

Global revenue. As in the 2012 and 2016 studies, the global revenue figure was derived by first converting annual revenue/income reported by coaches to U.S. dollars and then grossing up from the estimated numbers of active coaches. The basic methodology has therefore remained unchanged.

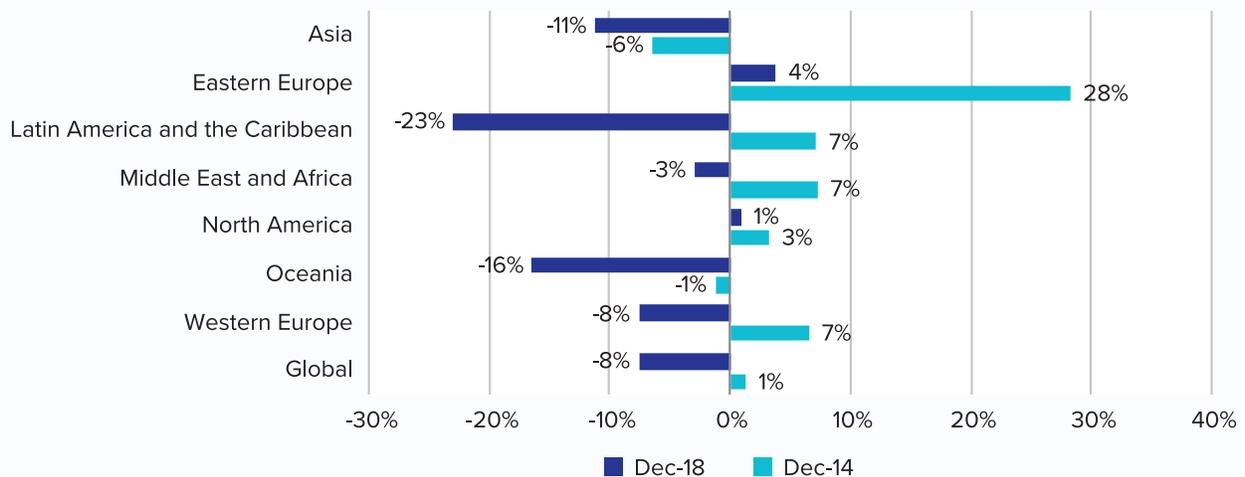
However, revenue comparisons between the studies will be affected by fluctuations in exchange rates.

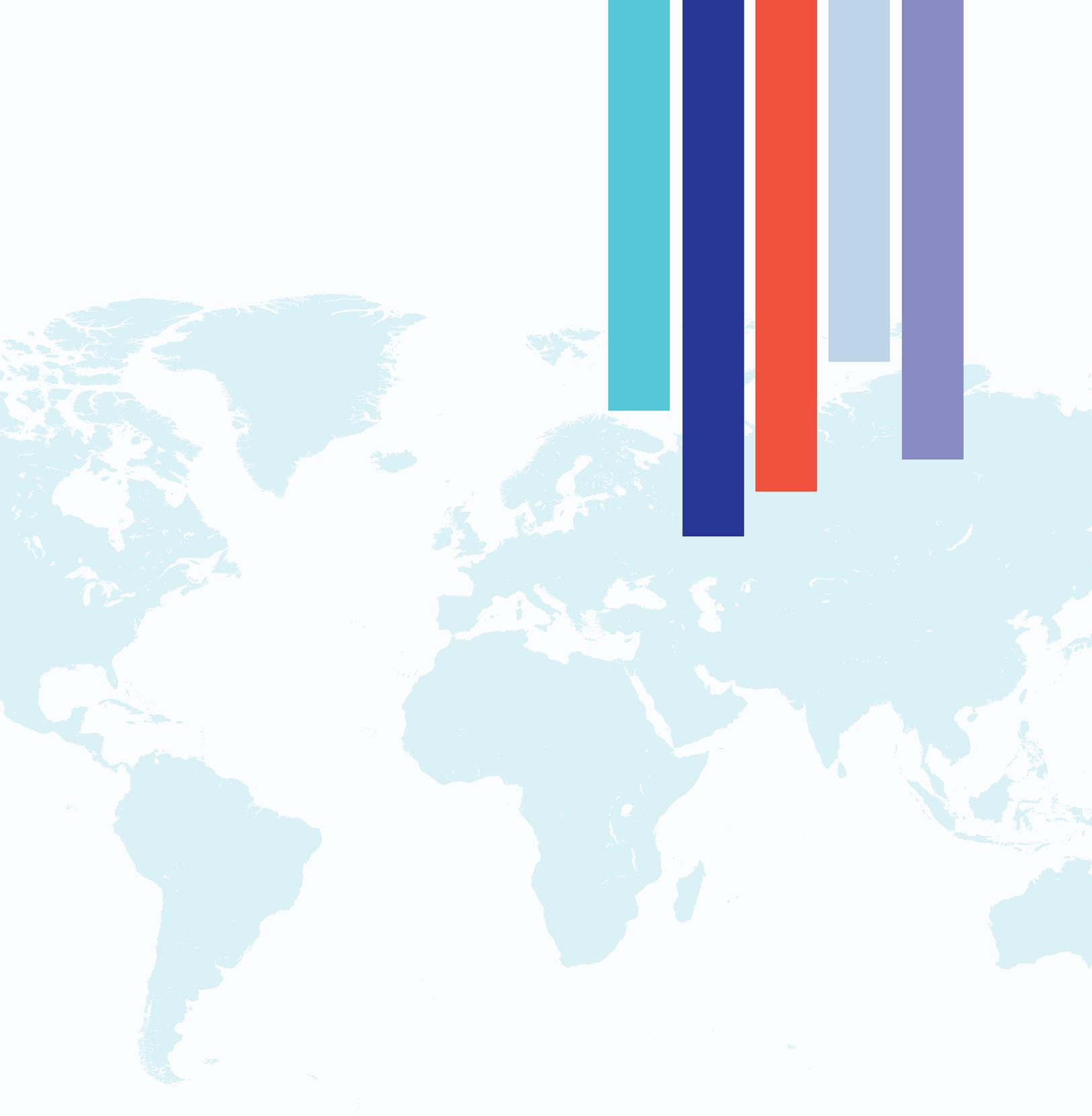
The revenue/income figures were converted to U.S. dollars based on international exchange rates published by the World Bank. The conversion to U.S. dollars provides a common standard for comparisons across regions at given point in time; i.e., the set of prevailing exchange rates.

Over the period since the *2016 ICF Global Coaching Study*, the U.S. dollar has strengthened. Between December 2014 (the time period for the currency rates used in the 2016 study) and December 2018 (the time period for the currency rates used in the 2020 study), the U.S. dollar appreciated by an average of 16% against all other currencies.

The effect of the strengthening U.S. dollar can be illustrated as follows. If the U.S. dollar exchange rate had remained constant over the period from December 2014 to December 2018, the global growth in the average annual revenue/income figures reported in Section 2 would have been estimated at +1% rather than -8%. At December 2014, rather than December 2018, exchange rates, Latin America and the Caribbean would have registered positive change, as would the Middle East and Africa and Western Europe.

Average annual revenue/income: Percent change 2015-2019 by exchange rate regime





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NOTE: *The figures presented in this report are based on survey responses and therefore rely on the accuracy of the data provided by the survey respondents.*

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