



2016 ICF Global Coaching Study

EXECUTIVE SUMMARY

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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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Introduction

This is a summary of the findings from the *2016 ICF Global Coaching Study*. The study was commissioned in 2015 by the International Coach Federation (ICF) and undertaken by PricewaterhouseCoopers.

This represents the third iteration of ICF's research on the size and scope of the coaching profession. Since the publication of the benchmarking and follow-up study in 2007 and 2012, respectively, the coaching profession has continued to evolve. Moreover, 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.

In this context, the *2016 Global Coaching Study* represents ICF's most ambitious, extensive and expansive industry research effort to date, capturing insights from professional coach practitioners and managers/leaders using coaching skills across the globe.

The Survey Process

The survey was launched online in July 2015 and was available in nine languages:

- English
- French
- German
- Italian
- Japanese
- Korean
- Mandarin
- Portuguese
- Spanish

A number of tactics were implemented to engage worldwide with coach practitioners and managers/leaders using coaching skills, including:

- Sending personalized email invitations and survey links to current ICF Members and Credential-holders, individuals with expired ICF Memberships, 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)
- Sending email invitations and survey links to individuals who had participated in previous iterations of the study and expressed their willingness to do so again in the future
- Inviting ICF Members to forward a generic link to the online survey registration site to their professional network to initiate a "snowball" effect
- An email and social media campaign encouraging ICF Chapter Leaders worldwide to promote the survey in their communities
- Designing the survey to be completed using a range of mobile devices
- Issuing email reminders to contacts who'd not yet completed the survey, as well as new, monthly emails to coaches who joined ICF after the survey launch
- Promoting the survey with coaches who attended local, regional and global ICF events

Additionally, 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 organizations:

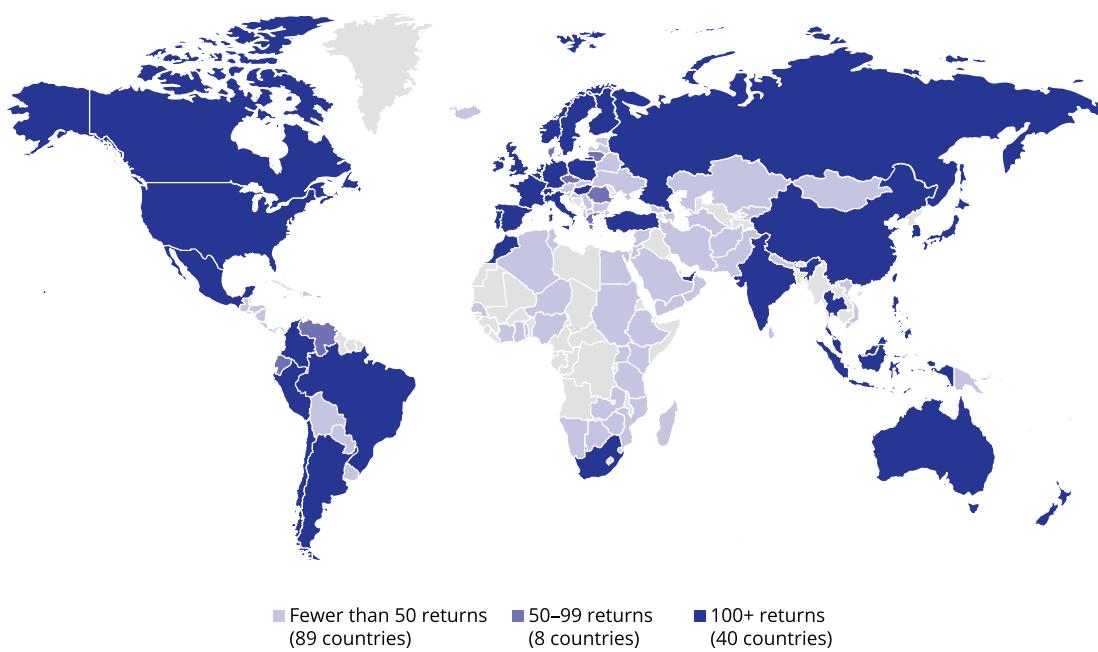
- Association for Coaching (AC)
- Association of Coach Training Organizations (ACTO)
- European Mentoring and Coaching Council (EMCC)
- Graduate School Alliance for Executive Coaching (GSAEC)
- International Association of Coaching (IAC)
- World Business & Executive Coach Summit (WBECS)

Survey Outcomes

With 15,380 valid survey responses from 137 countries, the 2016 *ICF Global Coaching Study* represents ICF's largest, most ambitious industry research project to date. (The 2012 *ICF Global Coaching Study* yielded 12,133 responses from 117 countries.)

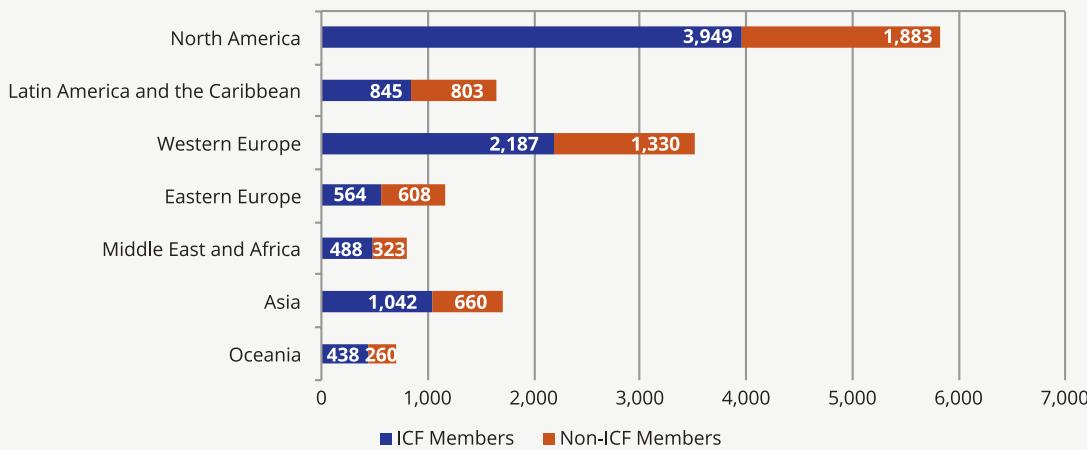
Forty countries achieved 100-plus survey responses each, qualifying leaders of their ICF Chapters to receive access to customized survey data presented via an online data reporting platform. Also crossing the 100-plus response threshold were:

- 18 U.S. states
- Four Canadian provinces
- Two regions in the United Kingdom
- Three Australian territories



The response from non-ICF Members further attests to the success of efforts to promote the survey widely. In total, 5,867 valid responses were submitted by non-ICF Members, representing 38% of the total number of completed surveys. By comparison, non-ICF Members accounted for 36% of valid responses in the 2012 study.

Survey responses by region and ICF Membership



An Updated Survey Design

The questionnaire for the 2016 study is very similar to the instrument employed for the 2012 *ICF Global Coaching Study*, facilitating comparisons across a wide range of topics.

The most significant change was made to the screening question posed at the beginning of the questionnaire. For the 2012 study, respondents were screened in for the purposes of the survey if they answered “yes” to the following question: “Are you a professional coach?”

In order to obtain indicative profiling information on managers/leaders using coaching skills, a two-stage approach was adopted for the 2016 study. Similar to the 2012 study, respondents were first asked if they considered themselves to be a professional coach. In a follow-up question, respondents were asked to select 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

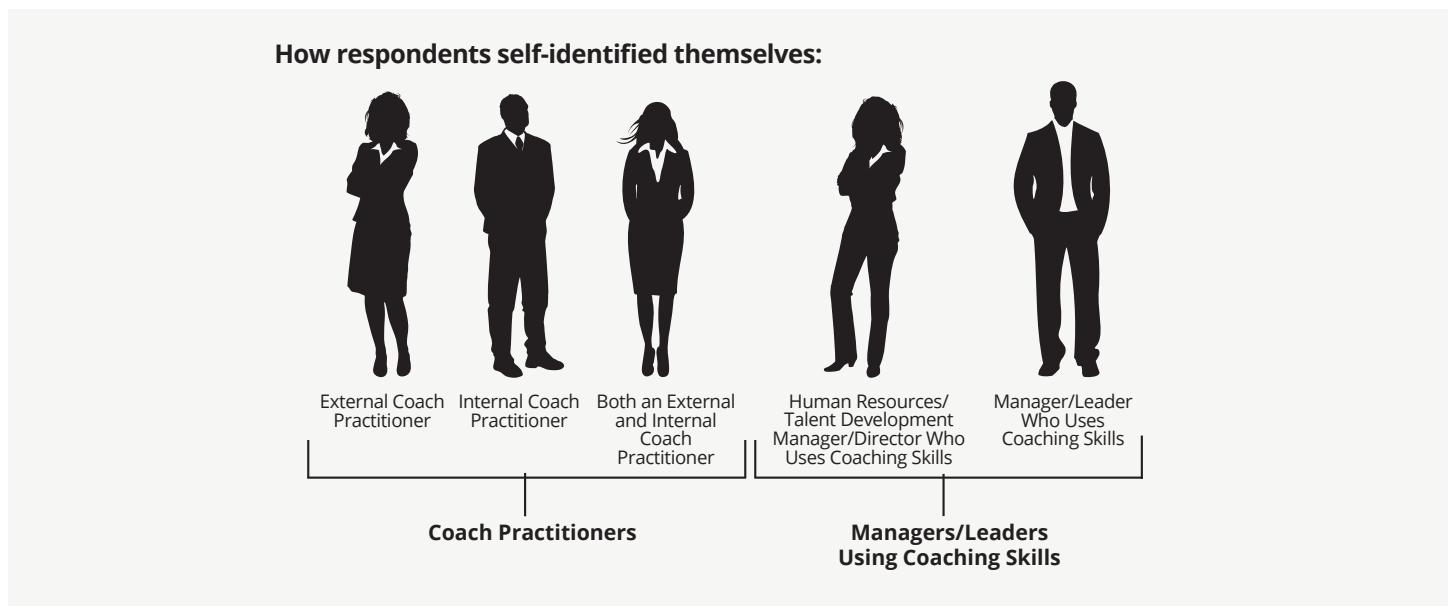
No further questions were asked of those responding “none of the above.” The remaining identifiers were used to classify respondents into two broad categories: coach practitioners and managers/leaders using coaching skills.

The Coaching Continuum

In estimating the size and scope of the coaching profession, the 2012 *ICF Global Coaching Study* adopted a binary view based on how respondents answered the question, "Are you a professional coach?" However, as a growing number of individuals and organizations apply coaching approaches and skills outside the context of traditional coaching engagements, this binary view is no longer sufficient.

The term "coaching continuum" accounts for a 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 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.



Size and Scope

A key objective for the study was to determine estimates of coaching revenue by type of coaching, geographical region and global total. In order to determine these revenue figures, it is first necessary to make some assumptions about the number of coaches that there are in the world.

Currently, there is not an accepted, globally inclusive list of individuals on the coaching continuum. Consequently, it was necessary to estimate the number of coaches, 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. This methodology is fully outlined in the Technical Appendix of the Final Report.

From the available data, it is hereby estimated that there are presently approximately 53,300 professional coach practitioners worldwide. Western Europe accounts for the largest share (35%), followed closely by North America, with an estimated 33% share.

Applying the membership ratio method to the survey results yields an estimated 10,900 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.

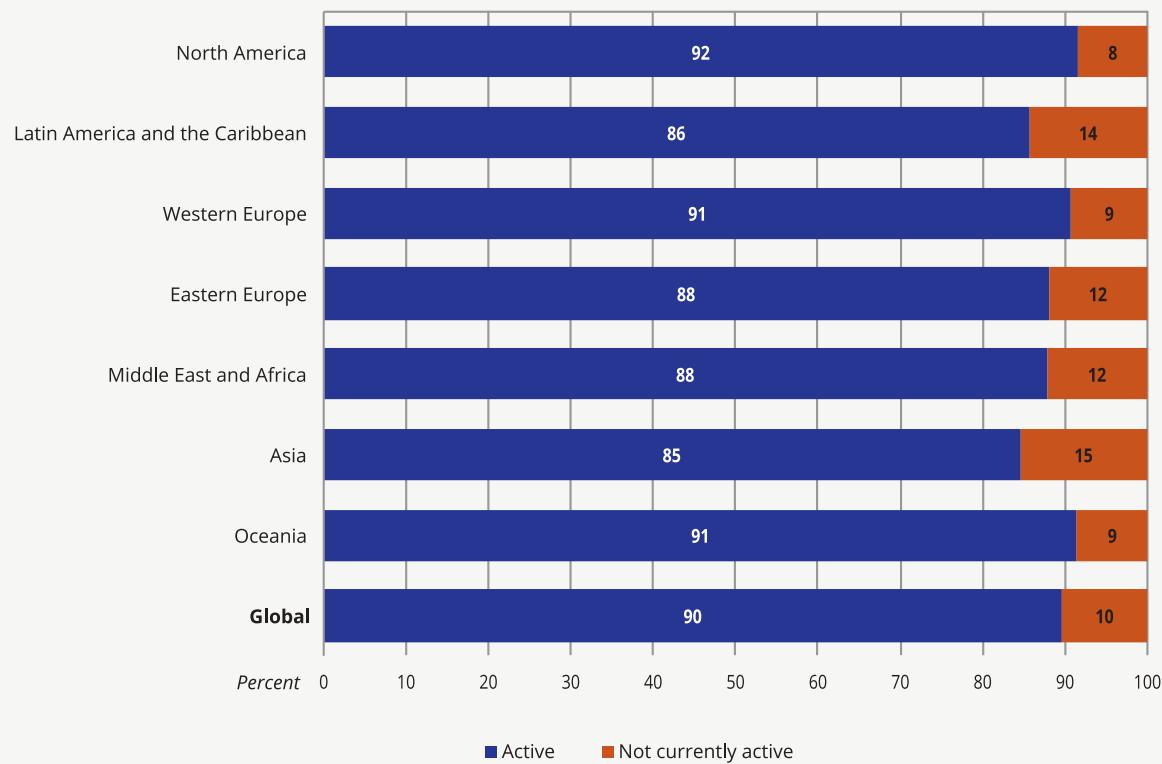
Coach practitioners and managers/leaders using coaching skills: Estimates by world region

	Coach practitioners	Managers/ leaders using coaching skills	Coaching continuum
North America	17,500	3,100	20,600
Latin America and the Caribbean	4,000	1,000	5,000
Western Europe	18,800	2,700	21,400
Eastern Europe	4,500	1,500	6,000
Middle East and Africa	2,400	700	3,100
Asia	3,700	1,500	5,200
Oceania	2,400	400	2,800
Global	53,300	10,900	64,100

NOTE: Estimates are shown to the nearest 100. Therefore, subtotals may not add to the total figures.

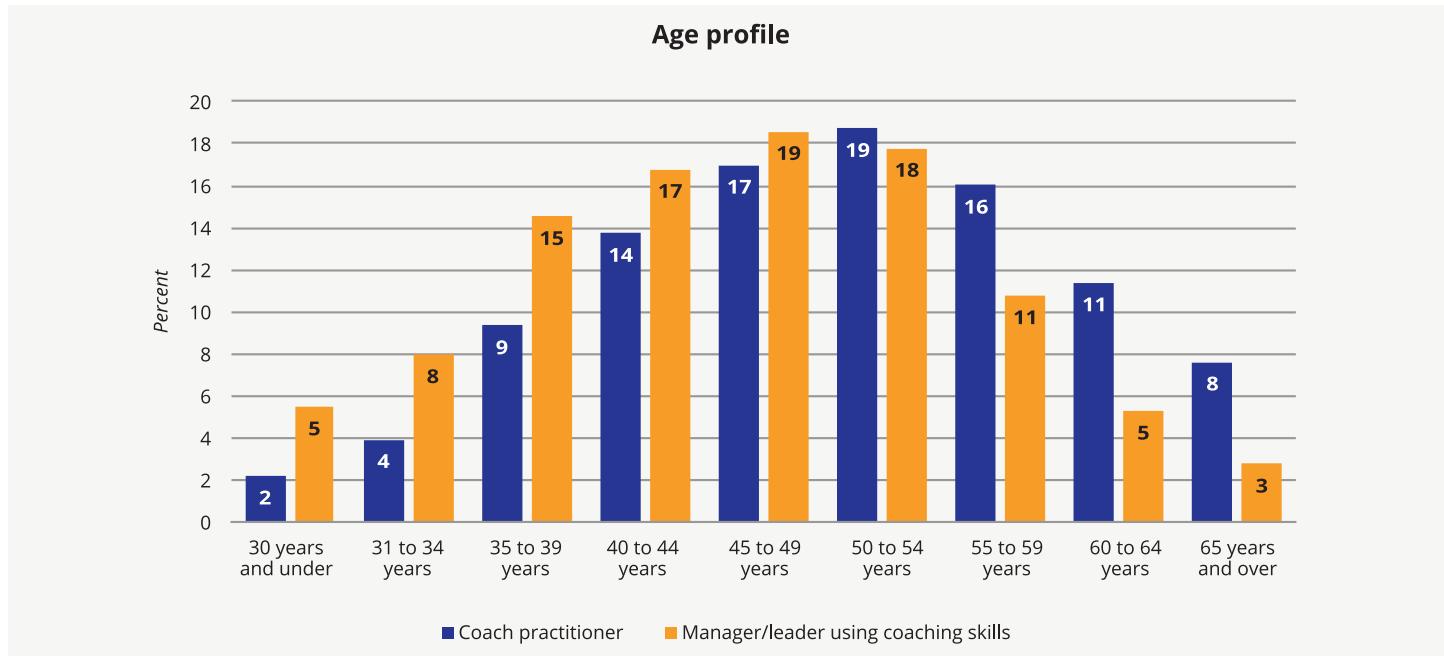
Ninety percent of coach practitioners said they currently have active clients. The proportion of coach practitioners with active clients was highest in the established regions of North America (92%), Oceania (91%) and Western Europe (91%).

Active coaches: Percent of coach practitioners



Age Profile

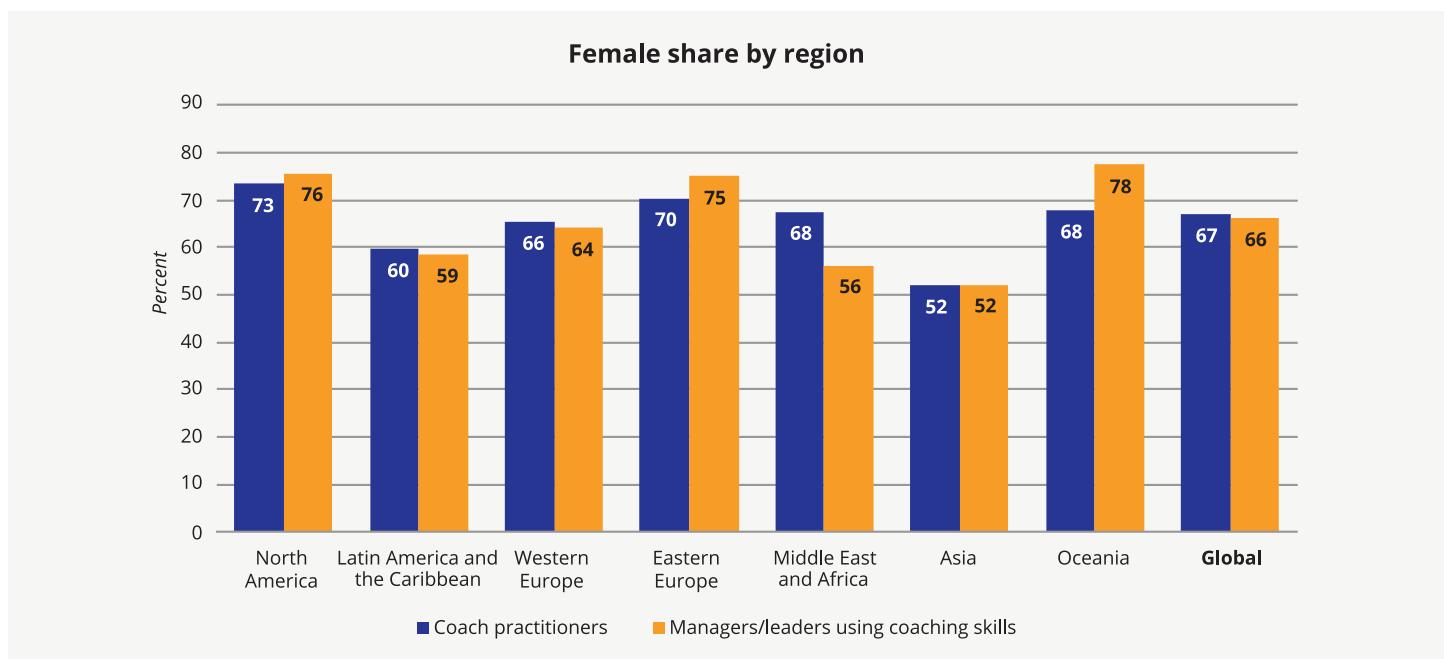
Coach practitioners who responded to the survey are almost equally split between those under age 50 (46%) and those age 50 and over (54%). Almost one in five coach practitioners (19%) are in the 50–54 age range, and a little more than half of coaches are between 45 and 59 years of age.



The age profile of managers/leaders using coaching skills skews toward younger age groups. Almost half are under 45 years of age. The proportion of managers/leaders using coaching skills who are under age 40 is almost twice that of coach practitioners (28% versus 15%).

Gender

Females account for 67% of coach practitioners and 66% of managers/leaders using coaching skills. Regionally, the female share of coach practitioners is highest in North America and lower in emerging markets. The regional pattern among managers/leaders using coaching skills is broadly similar to coach practitioners.



Income and Revenue

Coach practitioners with active clients were asked to provide their annual income generated by coaching only. Respondents provided annual revenue data in a total of 73 different currencies.

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 high-income regions of North America, Western Europe and Oceania.

However, it should be remembered that while revenue data has been provided in one currency, the value of the amounts quoted in individual countries must be contextualized in terms of Purchasing Power Parity (PPP) and diverse standards of living. This subject is explored in greater detail in the Final Report.

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

Average annual revenue/income, USD Average

	USD
North America	\$61,900
Latin America and the Caribbean	\$27,100
Western Europe	\$55,300
Eastern Europe	\$18,400
Middle East and Africa	\$35,900
Asia	\$37,800
Oceania	\$73,100
Global	\$51,000

Average income from coaching estimates for 2015 can be compared with the 2011 figures published in the *2012 ICF Global Coaching Study*. The comparison in terms of U.S. dollars indicates modest growth of 6% from 2011–2015.

For each of the seven world regions, total revenue from coaching was derived by combining the regional estimate for active coaches with average annual revenues from coaching. On that basis, the estimated global total revenue from coaching in 2015 was \$2.356 billion USD, representing a 19% increase over the 2011 estimate.

Total annual revenue from coaching

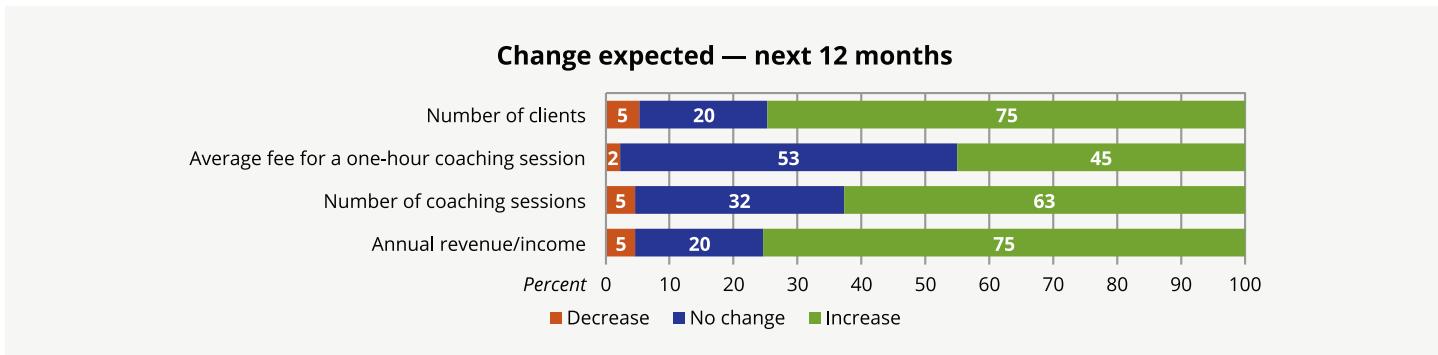
	USD (million)	% of global share	% change 2011-2015
North America	\$955	40.6	35.2
Latin America and the Caribbean	\$92	3.9	26.6
Western Europe	\$898	38.1	8.5
Eastern Europe	\$70	3.0	1.4
Middle East and Africa	\$73	3.1	7.1
Asia	\$113	4.8	18.8
Oceania	\$154	6.5	10.4
Global	\$2,356	100.0	19.0

NOTE: Percent change figures calculated from unrounded estimates. Some respondents, mainly internal coaches, quote zero annual incomes. They comprised 3.7% of coaches giving an annual revenue figure. The grossed-up results are adjusted for those responses.

Across the range of business/practice indicators, coach practitioners are looking forward to the next 12 months with confidence.

Three out of four coach practitioners with active clients (75%) said they expect their number of coaching clients to increase over the next 12 months. A similar proportion (75%) said they anticipate an increase in annual revenue from coaching. More than six in 10 (63%) said they expect their number of coaching sessions to increase.

Coach practitioners are somewhat less confident in an increase in average fees (45%). However, very few coach practitioners (2%) said they expect average fees to decline.



Training and Credentialing

Mirroring 2012's findings, the 2016 study demonstrates the high value professional coach practitioners place on training and credentialing. This expanded research also reveals that managers/leaders using coaching skills place a similarly high premium on these markers of professionalism.

Training

Almost all coach practitioners (99%) reported receiving some form of coach-specific training, with a large majority (89%) receiving training that was accredited or approved by a professional coaching organization.

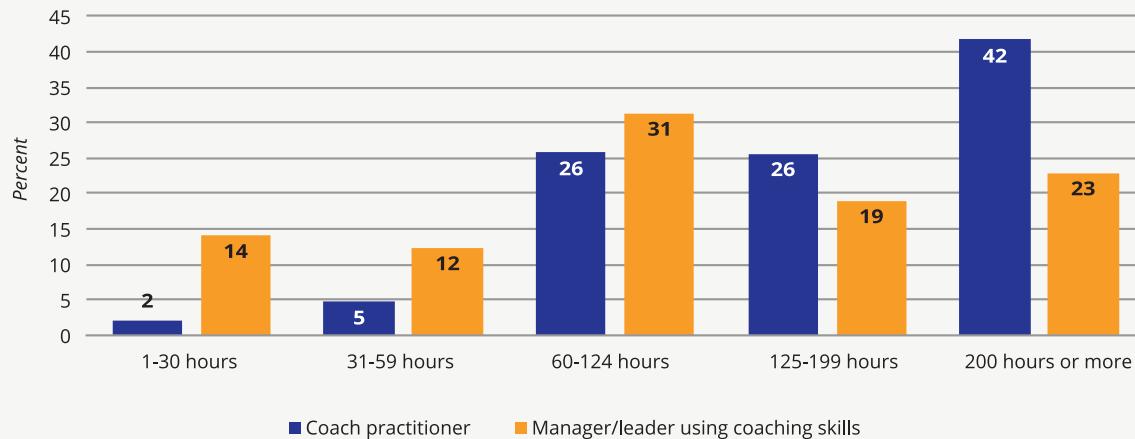
The receipt of coach-specific training was also very high among managers/leaders using coaching skills, with 93% reporting that they have received training. Almost three in four (73%) reported receiving accredited or approved coach-specific training.



Among coach practitioners who reported receiving coach-specific training, more than two in three (68%) have completed 125-plus hours of coach-specific training.

Fewer managers/leaders said they had received 125-plus hours of coach-specific training (42%). However, almost one in four managers/leaders using coaching skills (23%) reported receiving 200-plus hours of training.

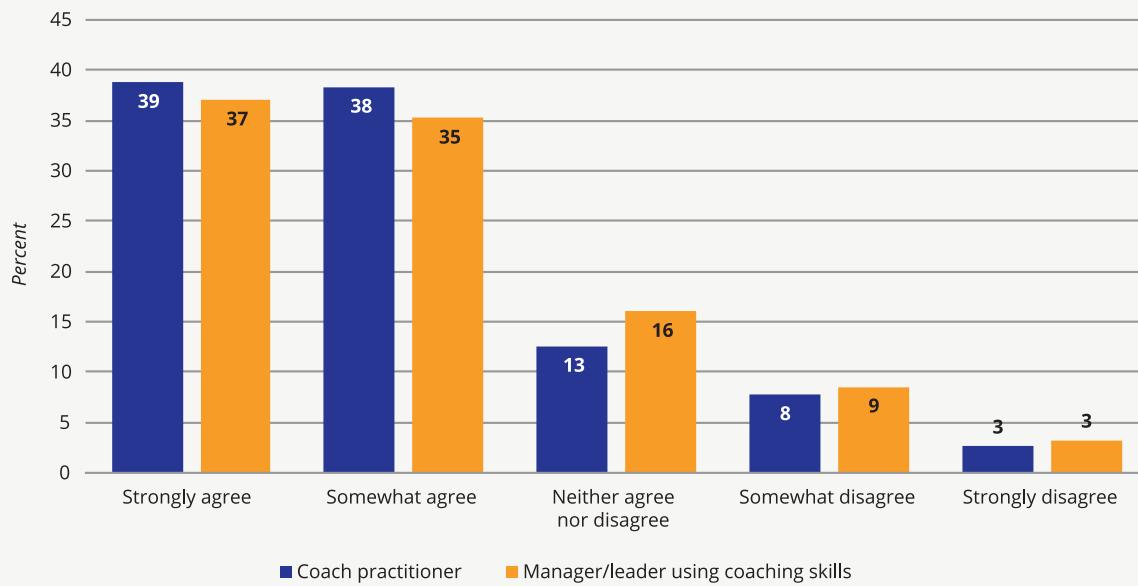
Hours of coach-specific training



Credentialing

A large majority of coach practitioners and managers/leaders using coaching skills agreed that individuals or organizations using coaching expect their coaches to be certified or credentialed.

People and organizations who receive coaching expect their coaches to be certified/credentialed



A majority of coach practitioners said they currently hold a credential or certification from a professional coaching organization, with 51% of coach practitioners reporting that they hold an ICF Credential.

More than half of managers/leaders using coaching skills said they do not hold any certification or credential from a professional coaching organization. However, one in four reported holding an ICF Credential, with 20% reporting credentials from other international, regional and/or national associations.

It should be noted that the sample proportions for certifications and credentials partly reflect the role of ICF's Member and Credential-holder database in conducting the survey.



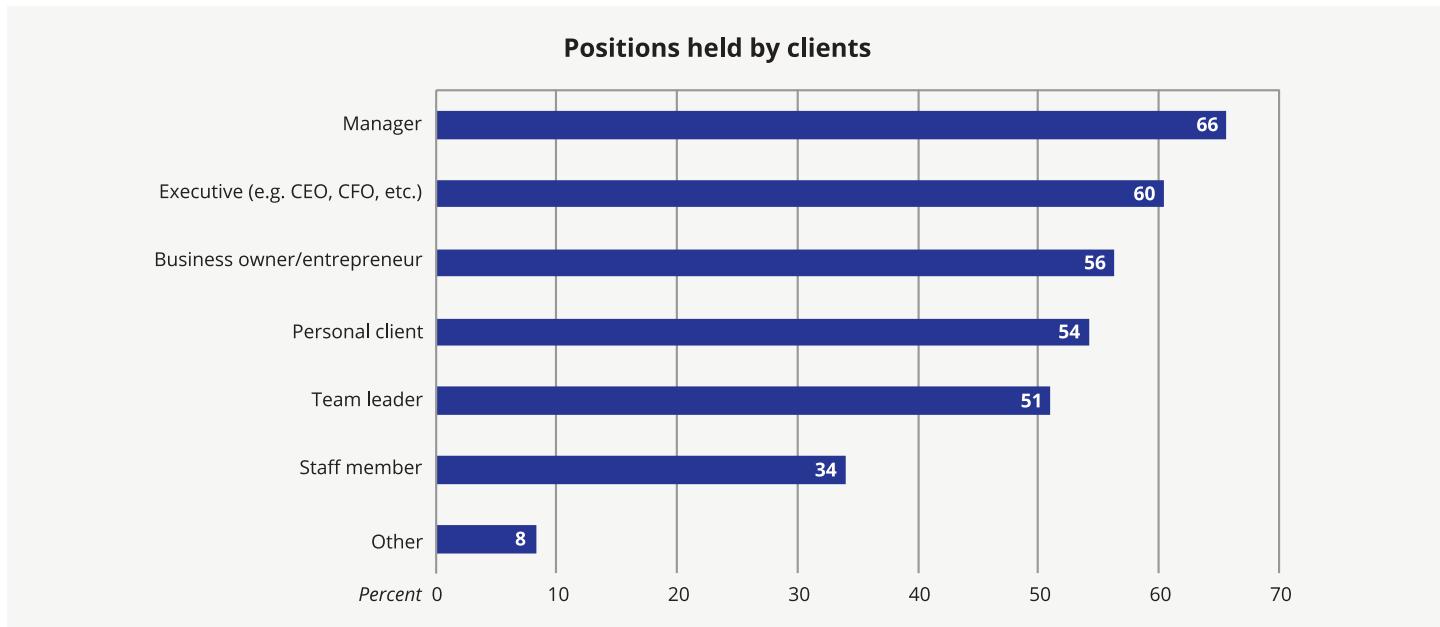
NOTE: The figures shown in the chart add up to more than 100 percent because some respondents may be members of more than one of the organization types listed.

Coaching Clients

Coach practitioners were asked several questions regarding the attributes of the clients they serve.

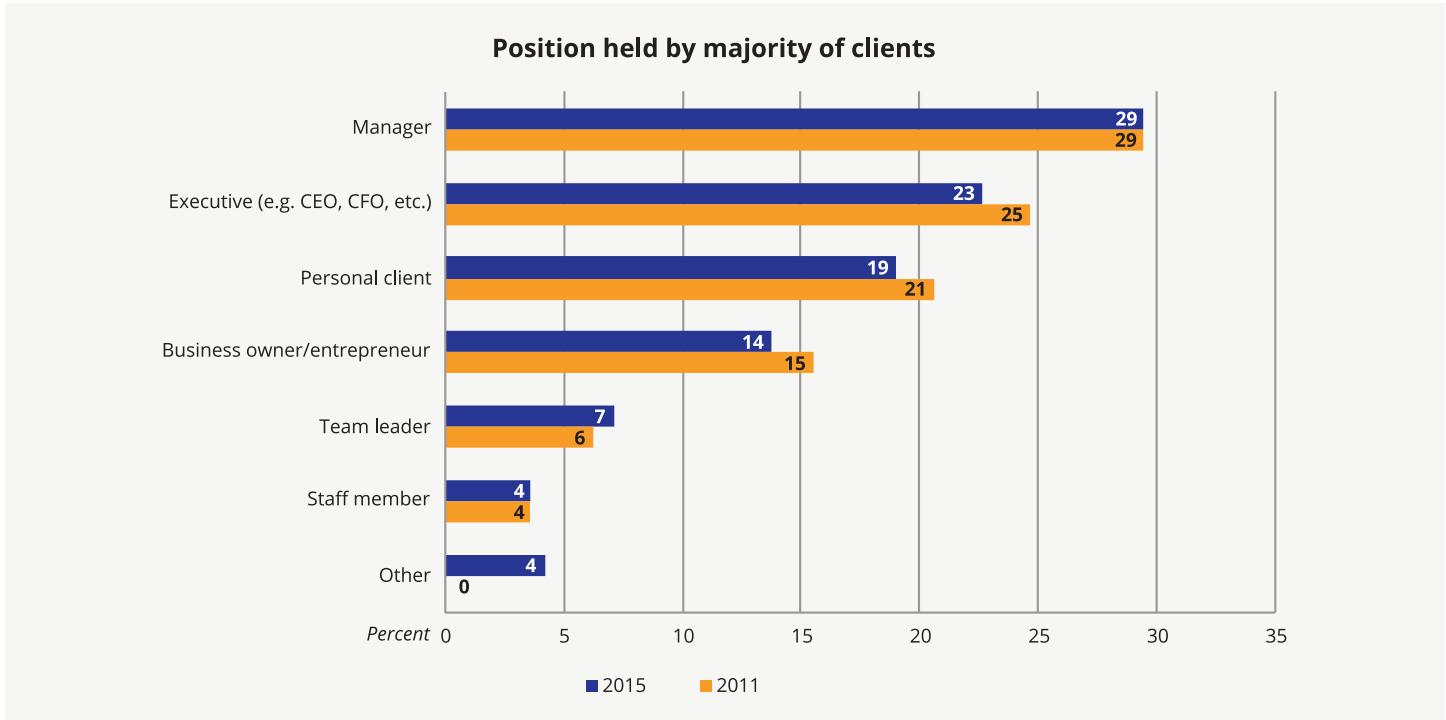
Position Held by Clients

When asked to identify the positions held by all of their clients, two in three practitioners said they coach managers, followed by executives, business owners/entrepreneurs, personal clients, team leaders, staff members and miscellaneous others. On average, respondents mentioned three positions.



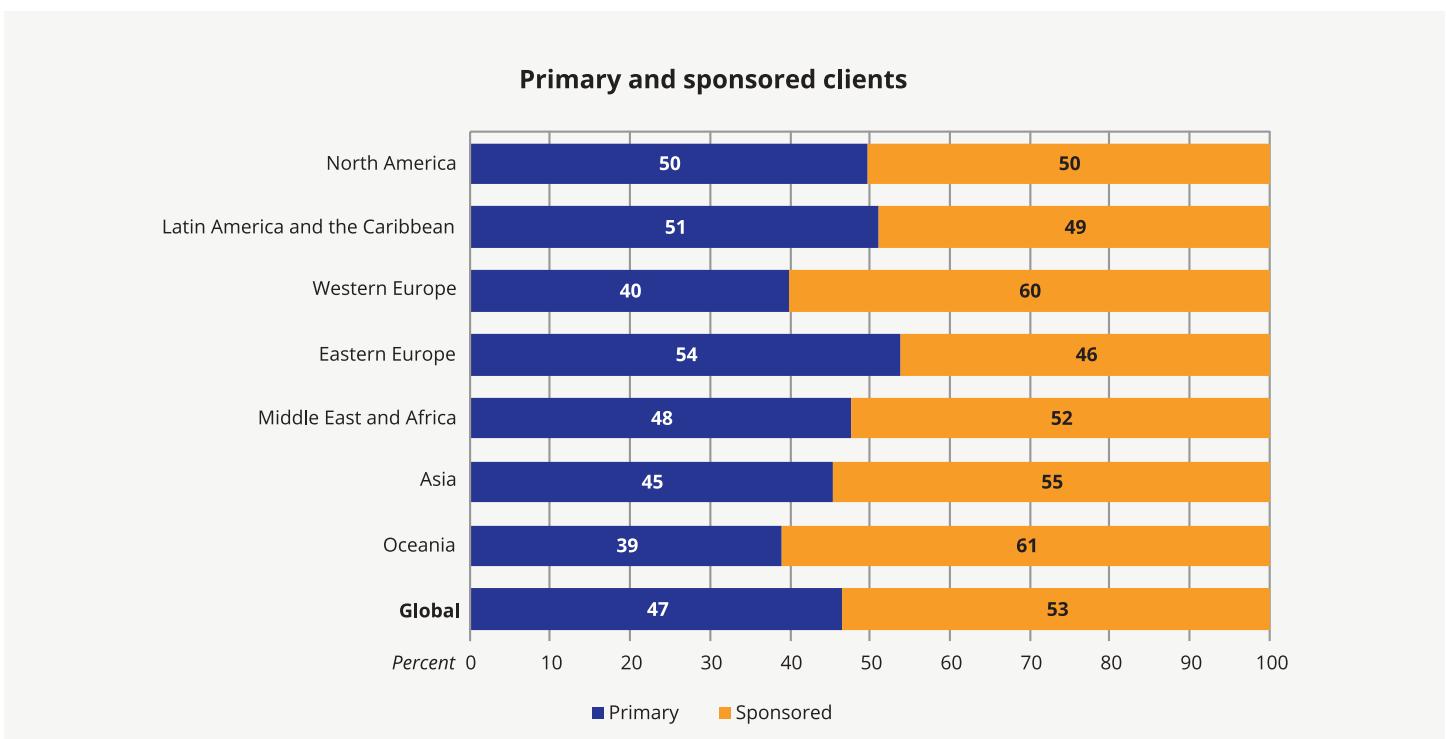
Coach practitioners were also asked to identify the position held by the majority of their clients. Managers were mentioned most frequently (29%). Almost one in four (23%) said they mainly coached executives, with a further 19% selecting personal clients.

The pattern of majority client positions is very similar to the results reported in 2012, both in terms of the frequency and rank order of positions. However, it should be noted that the miscellaneous "other" category was introduced for the 2016 study; hence, precise percentage figures should be compared with caution.



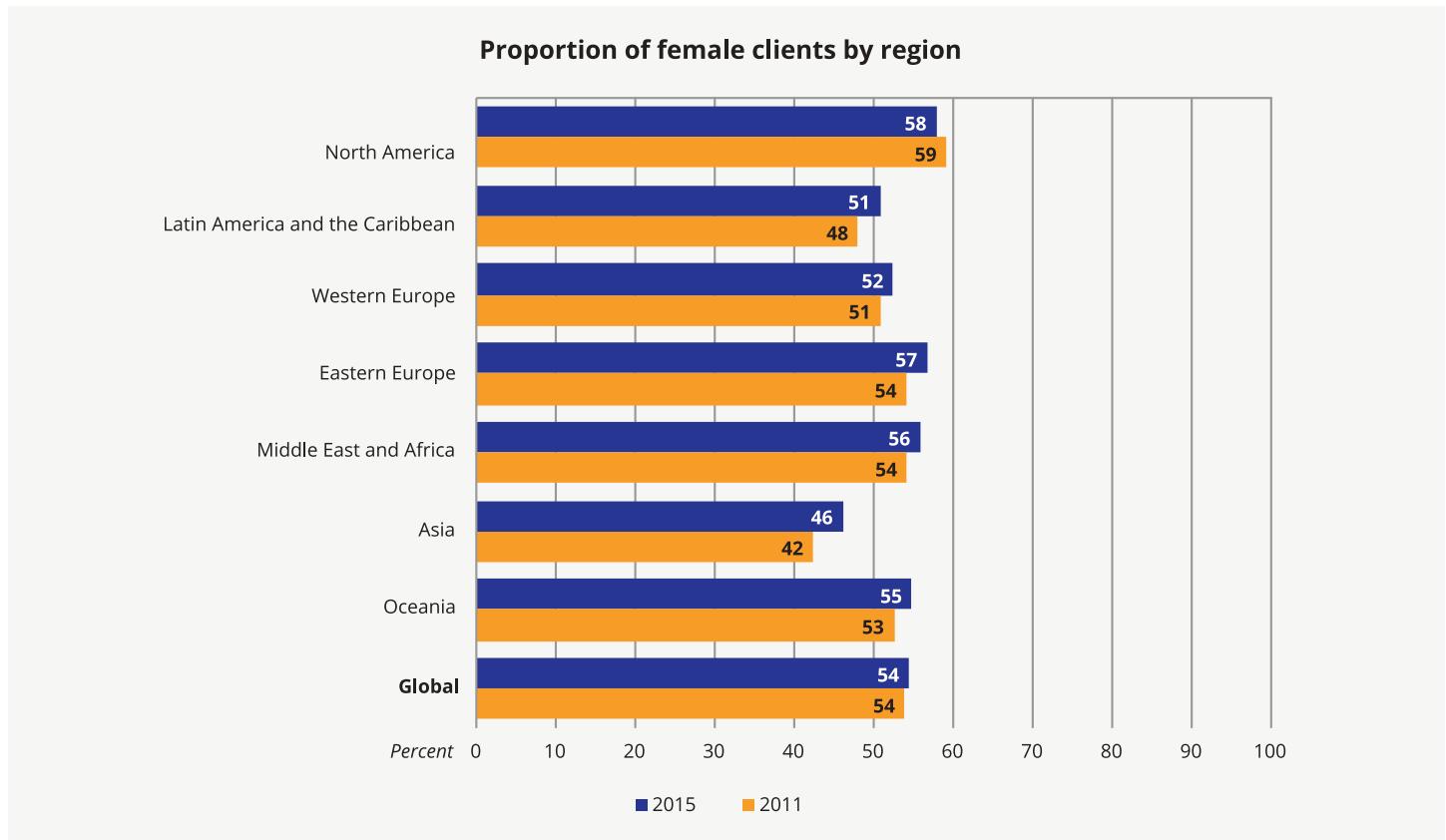
Primary and Sponsored Clients

Coach practitioners were asked what proportion of their clients pay for their own coaching (primary clients) and what proportion have coaching paid for by a third party (sponsored clients). Globally, the majority of clients are sponsored. Compared to 2011, the sponsored share has increased by two percentage points, from 51 to 53%.

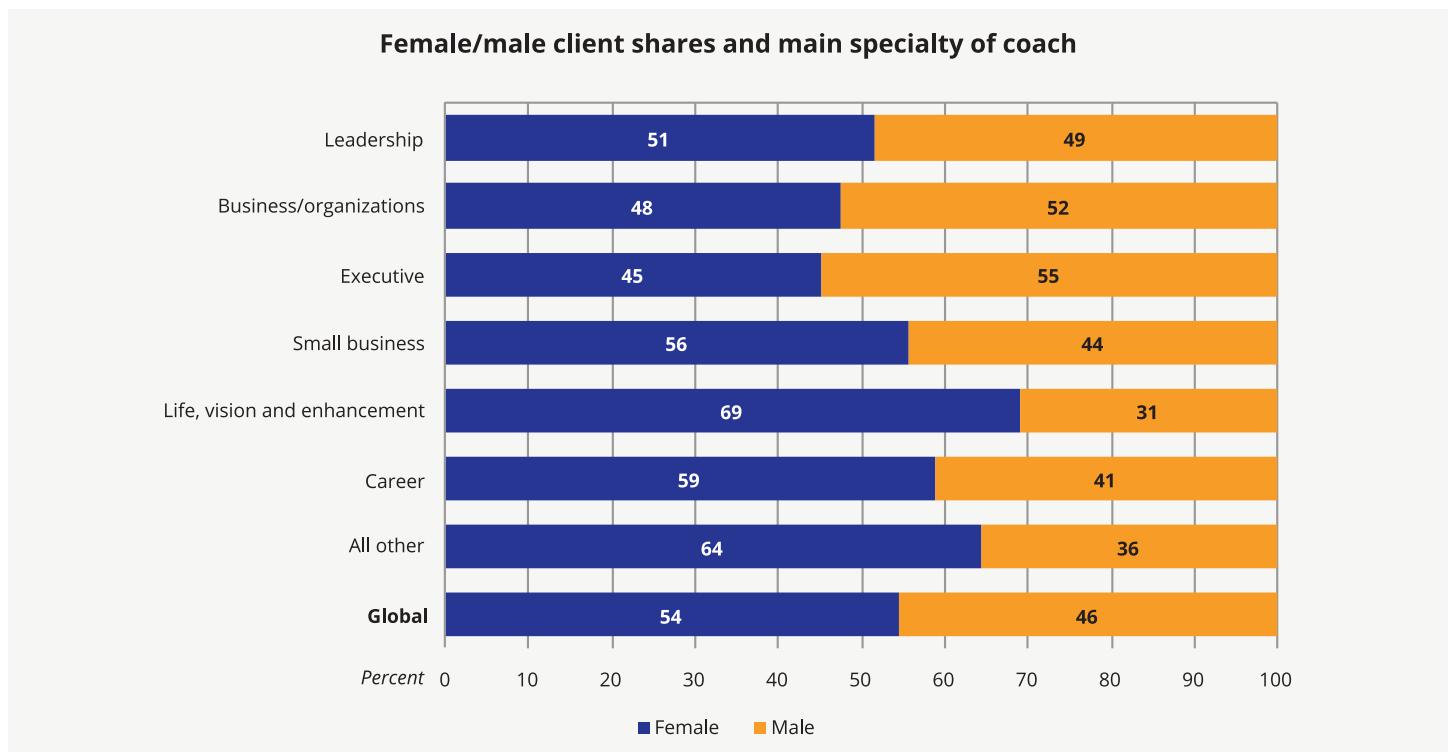


Gender of Clients

Females continue to account for the majority of coaches' clients. At 54% the female share of coaches' clients is unchanged from 2011. The regional pattern in client proportions by gender also remained stable between 2011 and 2015.

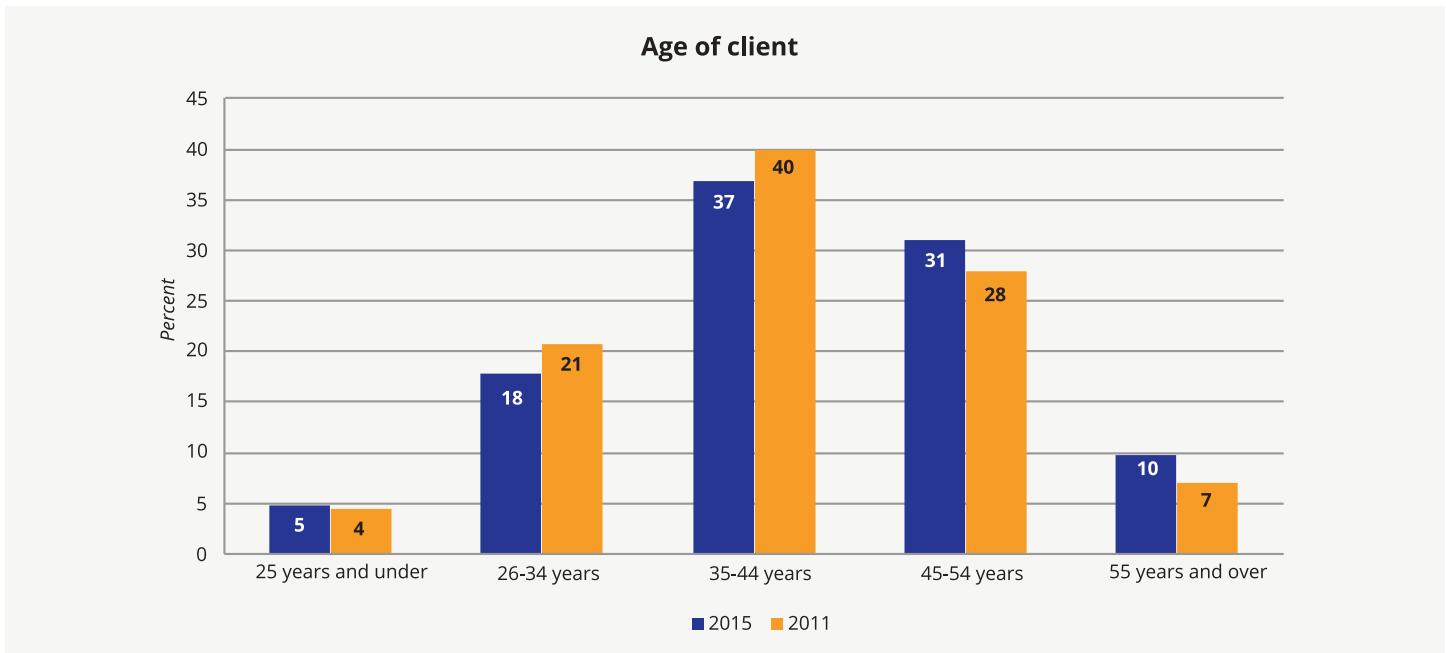


The gender share varies with the main specialty of the coach practitioner.

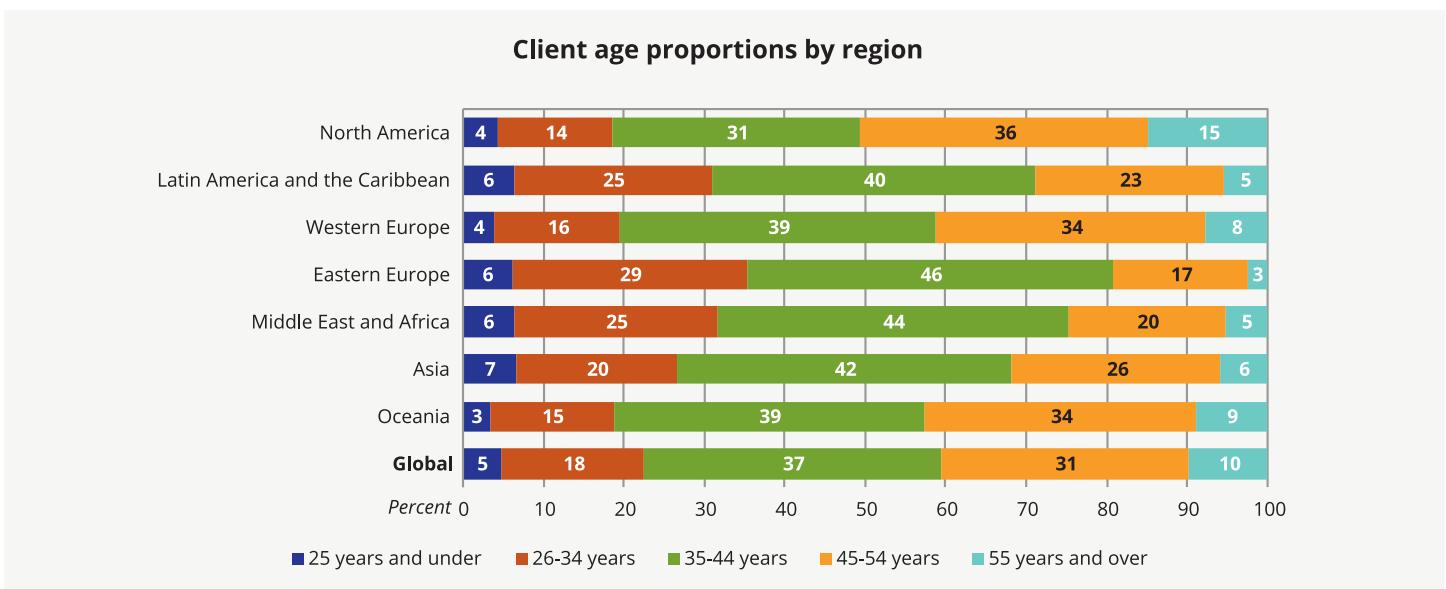


Age of Clients

Coach practitioners were asked to indicate the proportion of their active clients falling within a series of age bands. Their responses indicate that, on average, 60% of clients are under age 45.



When compared with 2011, the 2015 results indicate a shift in the age composition of clients toward older age groups. Notwithstanding the increase in the proportion of clients aged 45-plus, it remains the case that the age profile of clients tends to be younger in the emerging regions.

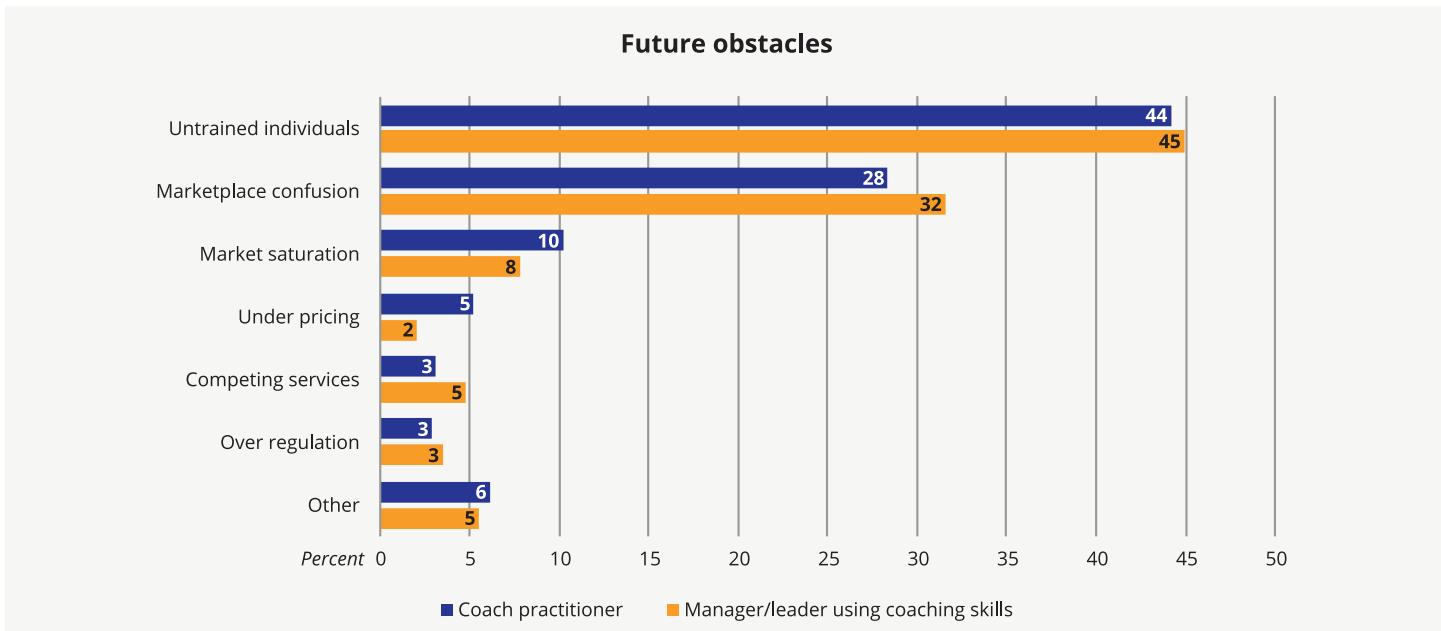


Future Trends

Respondents were invited to share their insights into obstacles and opportunities facing the profession over the next 12 months and their views on the extent to which coaching is able to influence social change.

Future Obstacles

When asked to identify the biggest obstacle for coaching over the next 12 months, the main concern expressed by coach practitioners was untrained individuals who call themselves coaches. The concerns expressed by coach practitioners echo the responses published in the 2012 study. The responses of managers/leaders using coaching skills aligned closely with those of coach practitioners, suggesting a common shared understanding of the obstacles facing coaching in the next 12 months.



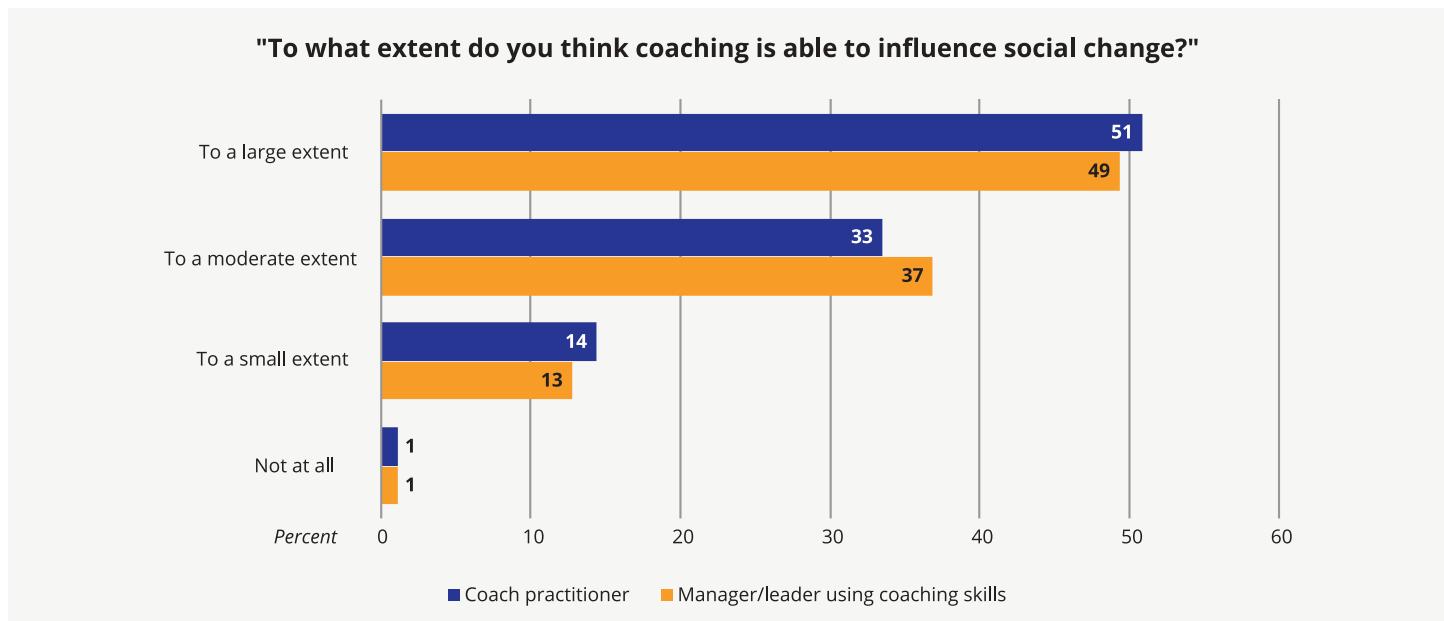
Future Opportunities

When asked to identify the greatest opportunity for coaching over the next 12 months, coach practitioners were most likely to identify increased awareness of the benefits of coaching. When compared with responses published in the 2012 study, the ranking of opportunities by coach practitioners has changed little. Also of note is the alignment between the views of coach practitioners and managers/leaders using coaching skills.

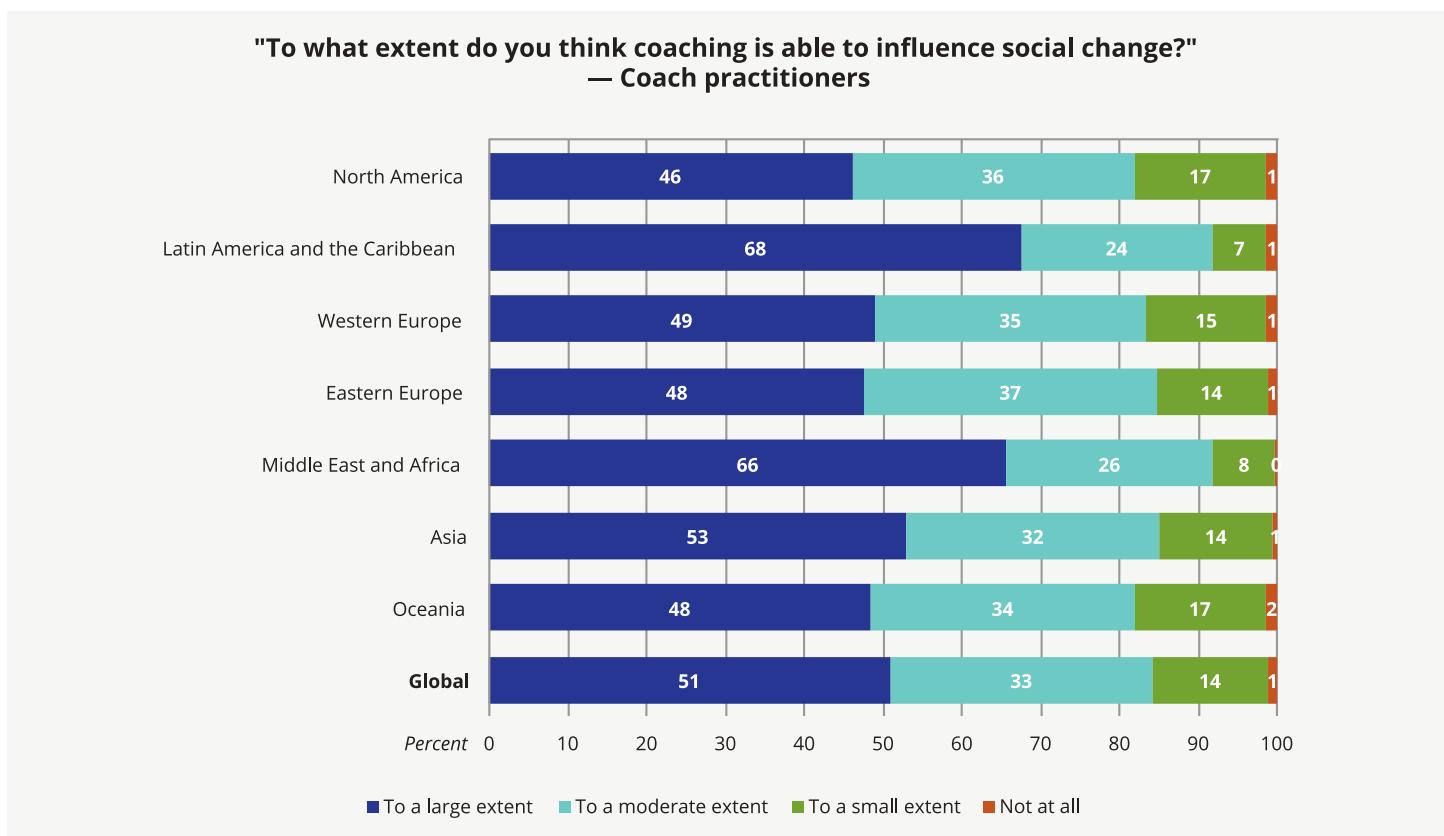


Influencing Social Change

Respondents were asked to indicate the extent to which they think coaching is able to influence social change. More than one in two coach practitioners believe to a large extent that coaching is able to influence social change. There is substantial agreement between coach practitioners and managers/leaders using coaching skills on that topic.



The extent to which coach practitioners say that coaching is able to influence social change varies considerably by region. Two in three coaches in Latin America and the Caribbean (68%) and the Middle East and Africa (66%) believe to a large extent that coaching is able to influence social change.



The Final Report

This summary report has presented the main findings from the *2016 ICF Global Coaching Study*. Detailed analysis and statistics can be obtained from the Final Report.

The topics included in the Final Report are as follows:

- The Coaching Continuum
- Training and Credentialing
- The Client
- Interaction Between Coach Practitioner and Client
- The Size and Scope of the Profession
- Summary Business Indicators
- Key Issues and Future Trends

To purchase the Final Report, visit Coachfederation.org/2016study.