2012 ICF Global Coaching Study

Final Report

International Coach Federation

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Section 1

Introduction

Introduction

This report presents the findings from the *2012 ICF Global Coaching Study*. The study was commissioned by the International Coach Federation (ICF).

Founded in 1995, the ICF is dedicated to advancing the coaching profession by setting high standards, providing independent certification and building a worldwide network of credentialed coaches. The ICF is a global organization, with a membership comprising more than 20,000 professional personal and business coaches located in over 100 countries.

The 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 coaches saw as the major challenges they face; and to estimate the size of the profession. When the benchmark Final Report was ultimately released, the *2007 ICF Global Coaching Study* included responses from 5,415 coaches living in 73 different countries - among them were more than 1,500 non-ICF member coaches .

The world has changed considerably in the period since the 2007 study. Following a sharp slowdown in 2008, global output fell in 2009 and subsequent economic recovery has been tentative. Nonetheless, the coaching profession would appear to have continued to expand; ICF membership numbers grew from around 11,000 in 2006 to almost 19,000 by the end of 2011.

Introduction

Against that backdrop, the *2012 ICF Global Coaching Study* is one of the most ambitious pieces of industry research ever conducted on the field of professional coaching.

The study was designed to engage with as many coaches as possible on a worldwide basis, to provide an up-to-date picture of the coaching profession which will assist in meeting the challenges that lie ahead.

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 *2012 ICF Global Coaching Study* were as follows:

- To obtain profiling information of the coaching industry, (e.g. gender, age, level of education, training).
- To gain an understanding of the main types of coaching specialties which are currently being undertaken.
- To determine estimates of coaching revenue by type of coaching, geographical region and global total.
- To establish usage drivers for those who use coaches (overall and by type of coach) and identify the reasons given for hiring coaches.
- To identify industry trends and assess attitudes towards a range of challenges facing coaches.

Introduction

Questionnaire design

The questionnaire for the *2012 ICF Global Coaching Study* comprised four main sections.

- **The coach.** The first set of questions asked respondents to provide information relating to their location, age, education, coach-specific training and coaching credentials.
- **The client.** This second set of questions sought information on various attributes of the people to whom the respondents provide coaching services.
- **The size of the profession.** This section asked respondents about their current annual revenue/income from coaching, fees per 1 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 respondents on a range of issues that will affect the future direction of the profession.

The survey sought to extend and further develop the range of topics covered in the survey used for the *2007 ICF Global Coaching Study*.

The 2011 survey addressed a number of additional topics (e.g. the attributes that coaches consider may be important to a client). Other topics were significantly expanded such as membership of coaching associations and certification/credentials.

In order to accommodate the extensions and to keep the survey to a manageable length, some questions were not carried forward from the 2007 survey (e.g. whether the coach considers her/himself to be full-time or part-time). These changes limit the comparability of the two surveys.

Nonetheless, in reporting on the 2012 results, comparisons are made where possible. Further discussion of the comparability of the two surveys can be found in the Technical Appendix at the end of this report.

Introduction

Methodology

Following a pilot exercise in May 2011, the updated global survey was launched online in June 2011, when all ICF member coaches were sent a personalized invitation and survey link. Various strategies were adopted to facilitate and encourage the widest possible participation in the survey, both from ICF and non-ICF coaches.

The survey was made available online in nine languages and was also designed so that it could be completed using a range of mobile devices. ICF members were asked to send a generic link to the online survey registration site on to their wider networks of coaches, with the intention of initiating a 'snowball' effect that would attract even more non-ICF coaches.

Over the six-month survey fieldwork period, concluding in November 2011, global reminders were issued on a regular basis to those on the ICF contacts database who had yet to complete the survey. Coaches who joined the ICF membership after the initial launch were also invited to participate through the monthly global reminder campaign.

Throughout 2011, the ICF also promoted the survey extensively with coaches who attended regional and global ICF Conference events held in Madrid, Spain, Las Vegas, USA, and Santiago, Chile.

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).

Introduction

Survey outcomes

The efforts deployed to maximize participation in the 2011 survey proved very successful.

With 12,133 valid responses, the 2012 study is large in scale, providing a wealth of detailed information on the coaching profession.

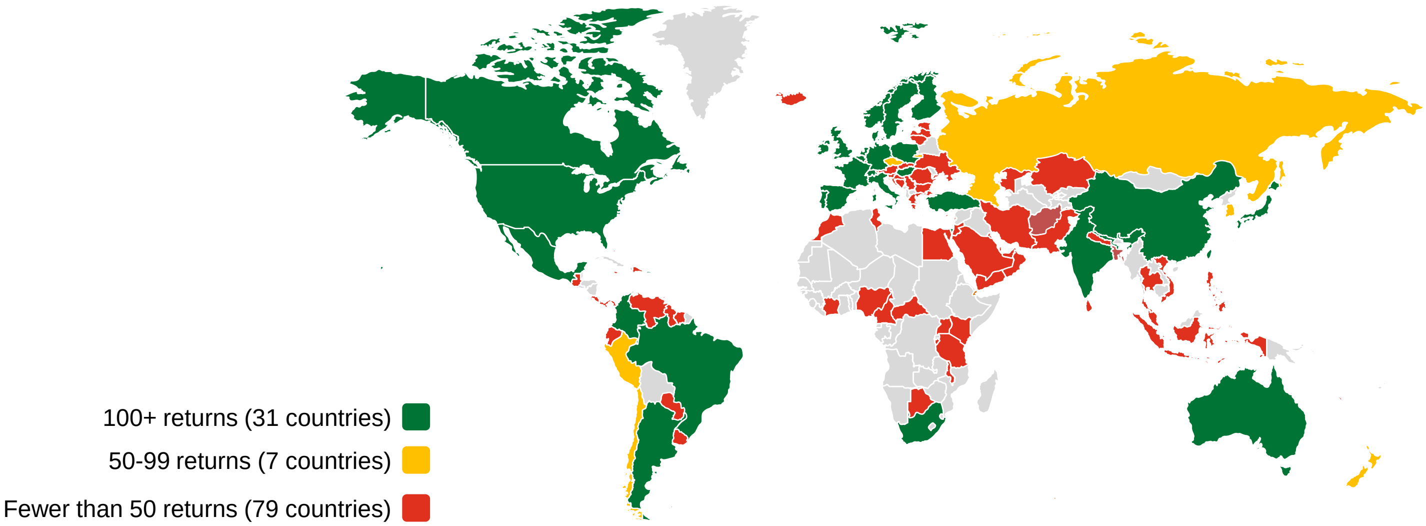
It is also a truly global survey. Responses were received from professional coaches located in 117 countries, an unprecedented response. Over 100 survey returns were received from thirty-one countries spread across all the major world regions.

The survey was also successful in reaching out to the wider coaching profession. Almost 4,400 valid responses were received from non-ICF members. Western Europe and North America each contributed around 1,400 to the non-ICF total (see accompanying chart).

The response from non-ICF members was above average in the Middle East and Africa, where one in two responses were from non-ICF members, followed by Asia (46%).

Over 7,700 ICF members responded to the survey. The largest number of ICF member responses were from North America (3,565), reflecting the region's 52% share of the ICF contacts database. Over 2,000 responses were received from ICF members in Western Europe. Both Latin America and Asia generated in excess of 500 returns from ICF members.

Introduction

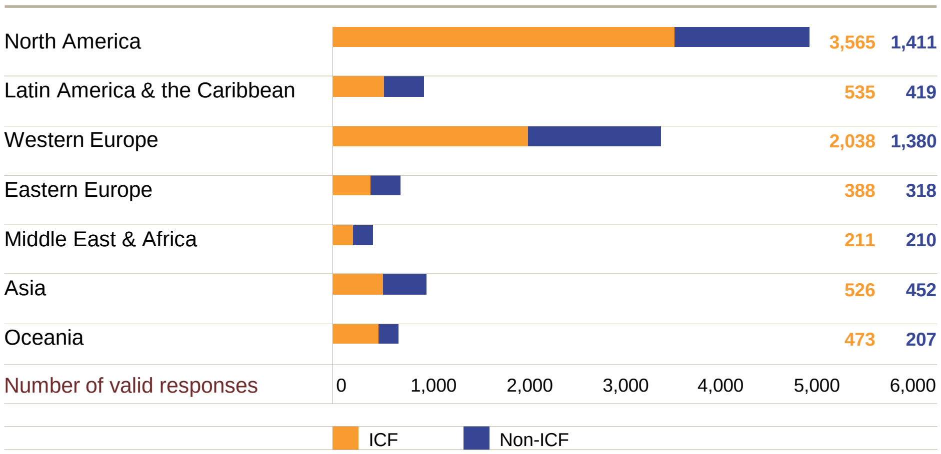


A global survey

A total of 117 countries participated.

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.

Survey responses by region



Introduction

The remainder of the report is structured as follows:

Section 2 The Coaching Profession: Size and Key Trends. This section presents estimates for the number of professional coaches by world region. These estimates 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 1 hour session, hours working as a coach and current active clients. The section concludes by looking at current and future trends in the key business indicators.

Section 3 Profile of Coaches. This section presents a picture of the diversity that exists within the coaching profession, illustrated by demographic attributes such as age and gender, levels of education and years of experience in coaching.

Coaches also vary in their positioning within the market for coaching (e.g. whether internal or external, the areas in which they specialize and the additional services that they offer).

Section 4 Training and Accreditation. Clients increasingly expect their coaches to be certified/credentialed. This section reports on the survey findings in relation to the incidence of coach-specific training and certification. It also looks at membership of coaching associations.

Section 5 The Client. This section focuses on the fact that coaches deal with a wide variety of clients and address a wide range of client concerns in their coaching engagements.

Section 6 The Interaction Between Coach and Client. This section focuses on coaches' engagement with their clients. The topics covered include: the attributes that clients consider important in a coach; methods of contact with the client; theoretical models from which coaches draw in helping their clients; and the methods used to assess the impact of their coaching.

Section 7 Key Issues and Future Trends. The survey provided coaches with the opportunity to comment on a range of issues facing the industry in the future, including: regulation of coaching; obstacles; and opportunities.

Section 2

The Coaching Profession: Size and Key Trends

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The Coaching Profession: Size and Key Trends

Introduction

A key objective for the *2012 ICF Global Coaching Study* was to determine estimates of coaching revenue both globally and by geographic region. This section commences with a presentation and discussion of the estimates for the size of the profession, focusing on the following key statistics:

- The estimated number of coaches.
- The number of coaches with active clients.
- Revenue/income from coaching.

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

- Number of active clients currently coaching.
- Average fee per 1 hour coaching session.
- Hours spent working as a coach.

Recent trends and the key indicators were assessed by asking coaches about their experience over the 12 months prior to receiving the survey in relation to client numbers, average fees, coaching sessions and annual revenue/income.

The section concludes with a look at how coaches view their business prospects over the next 12 months, as measured by expected changes in activity levels, fees and revenue/income from coaching.

In this section, results are presented both globally and for each of seven world regions. The regional classification is explained in the Technical Appendix.

The Coaching Profession: Size and Key Trends

The number of coaches

Given that no accepted, globally inclusive list of coaches was available to use as a sampling frame for the survey, the precise number of professional coaches currently practicing worldwide is not able to be confirmed.

It was therefore 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.

The methodology is fully detailed in the Technical Appendix. The estimation procedure benefits considerably from robust ICF membership counts, the large scale of the global survey including non-ICF members and the availability of information on membership overlaps.

It should be recognized that there is inevitably a degree of uncertainty regarding the total number of professional coaches.

From the available data, it is estimated that there are presently in the region of **47,500** professional coaches worldwide.

Number of coaches 2011

	Coaches	%
North America	15,800	33.2
Latin America & the Caribbean	2,600	5.4
Western Europe	17,800	37.5
Eastern Europe	3,500	7.4
Middle East & Africa	2,100	4.3
Asia	3,300	7.0
Oceania	2,400	5.1
Global	47,500	100.0

The number of coaches varies widely by region, from almost 18,000 in Western Europe to 2,100 in the Middle East and Africa.

Approximately one in three coaches is located in North America (15,800).

Due to differences in methodology, the 2011 estimate for the number of professional coaches worldwide cannot be compared with the previous 2006 estimate.

The 2006 estimate (30,000) was a minimum figure. Underpinned by a more detailed methodology, the 2011 estimate is presented as a reasonable estimate for the actual number of coaches.

The Coaching Profession: Size and Key Trends

Coaches by world region

Professional coaches are not evenly distributed across the globe. Rather, they are most highly concentrated in the high-income regions of North America, Western Europe and Oceania (primarily Australia and New Zealand).

Together, these three world regions account for 76% of the estimated global total of professional coaches. This can be compared with their 11% share of global population.

The much higher density of coaches in the three high-income regions is readily apparent from the ratio of coaches per 1 million population as shown in the accompanying table.

Globally, there are 6.9 coaches per 1 million population. In the high-income regions, the ratio of coaches per 1 million population is in excess of 40.

Nonetheless, the coaching profession is showing more rapid growth in the emerging regions outside the high-income regions.

Coaches by world region

	Coaches %	Per 1m population	Population %
North America	33.2	46.0	5.0
Latin America & the Caribbean	5.4	4.4	8.6
Western Europe	37.5	44.4	5.9
Eastern Europe	7.4	7.9	6.5
Middle East & Africa	4.3	1.7	18.1
Asia	7.0	0.9	55.4
Oceania	5.1	66.2	0.5
Global	100	6.9	100

Coaches by global income levels

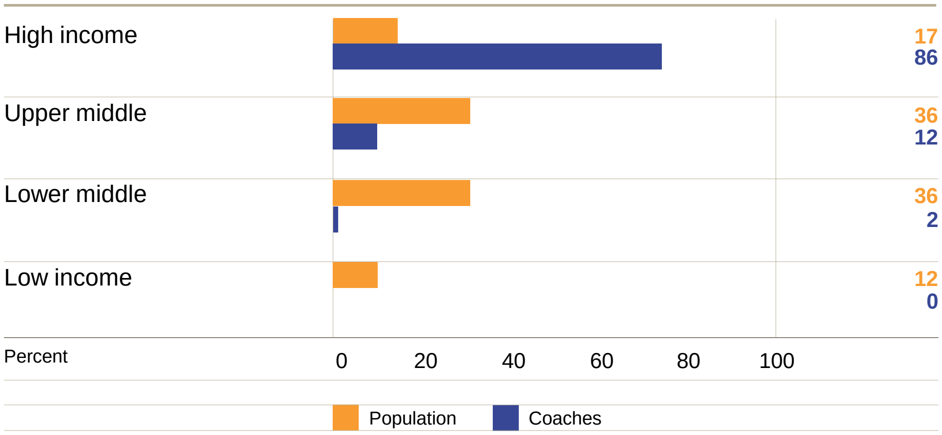
The correspondence between the density of coaches and regional income levels can be further illustrated by the proportion of coaches living in countries classified as 'high income' by the World Bank.

As can be seen from the accompanying chart, 86% of coaches work in high income countries, well above those countries' 17% share of world population.

The World Bank classifies countries to income groups on the basis of Gross National Income (GNI) per capita. A country's income per capita, or per person, is calculated by dividing total country income (GNI) by total population.

Source: World Bank, http://data.worldbank.org/about/country-classifications.

Distribution of coaches compared to population by country income



The Coaching Profession: Size and Key Trends

Active coaches

When asked about their current level of coaching activity, 87% of coaches said they had active clients at the time of their survey response. Therefore, the estimated global number of active coaches is **41,300**.

It should be noted that only active coaches were asked about revenues, fees per 1 hour session, hours worked, and clients.

The proportion of active coaches varied most strongly according to the number of years coaching. Among those with three or more years experience, 92% said they were active. By contrast, among the less experienced coaches, with two years or less, 75% said they were currently coaching active clients. The contrast may reflect the time taken for coaches to build up their clientele.

External coaches (1) were also more likely to have active coaching clients; 88% of external coaches said they had active current clients compared to 80% of internal coaches.

Regionally, the proportion of coaches saying they currently have active clients ranged from 78% in Asia to 89% in North America and Western Europe.

Active coaches

	Coaches	% of all in region
North America	14,000	89
Latin America & the Caribbean	2,100	82
Western Europe	15,900	89
Eastern Europe	2,900	82
Middle East & Africa	1,700	84
Asia	2,600	78
Oceania	2,100	87
Global	41,300	87

The variations by region largely reflect the regional patterns in factors such as experience and whether internal or external.

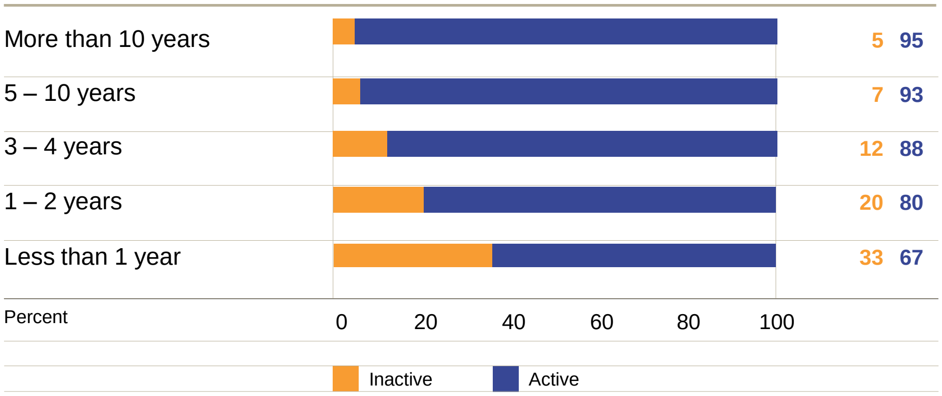
Even after allowing for such factors, however, the incidence of active coaches was significantly (2) lower in Asia compared to other regions.

(1) The Technical Appendix contains a glossary of definitions, including the external/internal distinction.
(2) By convention, in this report, the use of the term ‘significant’ refers to statistical significance.

Active coaches

Coaches with 5 or more years of experience were most likely to have current active clients.

Coaches with active clients by years of coaching experience



Annual revenue/income from coaching

Survey respondents with active clients were asked to give their annual revenue or income generated by coaching only. Those who responded provided annual revenue data in a variety of different currencies, depending on the country in which they reside. A total of 64 different currencies were used.

In order to provide a common reference point, the revenue figures were converted to US dollars based on international exchange rates published by the World Bank. When calculated in US dollars, average revenues are highest in the high-income regions of North America, Western Europe and Oceania.

There is, however, considerable variation in annual revenues earned from coaching, which is evident when comparing average and median revenues. The median is the middle value in the distribution of annual revenues and can be used to represent 'typical' earnings from coaching.

Globally, median annual revenues in 2011 were $25,000 (i.e. one half of coaches earned less than that amount from coaching and the remaining half earned in excess of $25,000).

Annual revenue/income, US$

	Revenue per active coach	
	Average US$	Median US$
North America	50,400	29,100
Latin America & the Caribbean	34,400	12,700
Western Europe	52,100	27,700
Eastern Europe	24,000	12,000
Middle East & Africa	39,600	20,000
Asia	36,500	13,700
Oceania	66,200	36,700
Global	47,900	25,000

Annual revenue/income from coaching: PPP (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 USA, 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 figure 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.

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

Revenue/income from coaching, PPP (international $)

	Annual revenue / income	
	Average PPP$	Median PPP$
North America	48,900	25,000
Latin America & the Caribbean	45,600	18,900
Western Europe	47,000	25,100
Eastern Europe	36,500	18,900
Middle East & Africa	52,000	23,600
Asia	52,500	21,400
Oceania	49,500	26,400
Global	47,500	25,000

Note: PPP adjustment factors sourced from the World Bank indicators database (http://data.worldbank.org/topic).

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

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

The Coaching Profession: Size and Key Trends

Total revenue from coaching

For each of the seven world regions, total revenue from coaching is derived by multiplying the regional number of active coaches (page 15) by average annual revenues from coaching (page 17).

From the accompanying table, it can be seen that global revenue shares (in US$ million at international exchange rates) are directly related to the geographical pattern in the number of coaches and regional differences in annual revenues from coaching.

Thus, Western Europe's share of global revenue (42%) is in excess of its share of the number of coaches (37.5%) because annual revenues per active coach ($52,100) are above average ($47,900).

Similarly, Asia's share of world revenue from coaching (4.8%) is less than its share of coaches (7%) because annual revenues from coaching in Asia ($36,500) are below the global average.

Total revenue from coaching

	US$ million	%
North America	707	35.7
Latin America & the Caribbean	73	3.7
Western Europe	828	41.8
Eastern Europe	69	3.5
Middle East & Africa	68	3.5
Asia	95	4.8
Oceania	139	7.0
Global	1,979	100.0

The Coaching Profession: Size and Key Trends

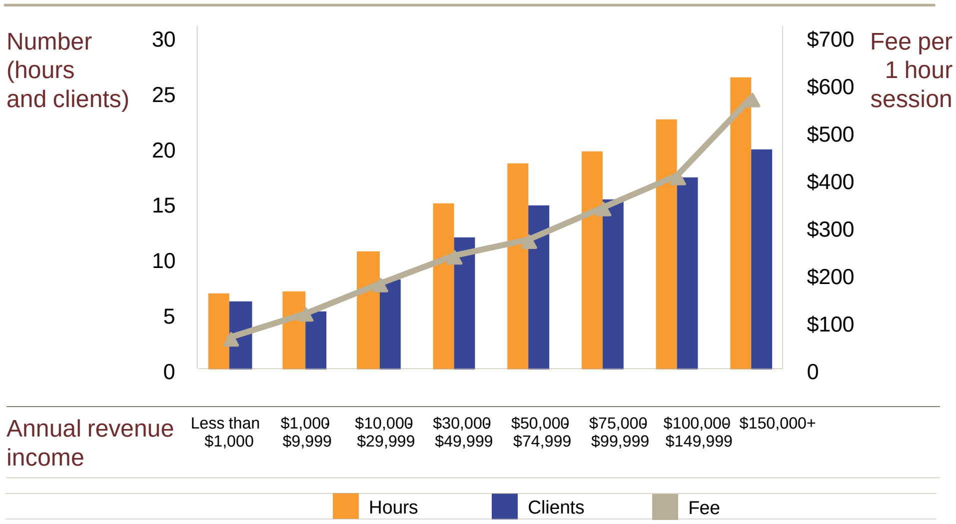
The coaching profession: Size and scale

	Coaches	Active	Annual revenue from coaching		Total revenue
			Average	**Median**	
	Coaches	*%*	*US$*	*US$*	*US$ million*
North America	15,800	89	50,400	25,000	707
Latin America & the Caribbean	2,600	82	34,400	18,900	73
Western Europe	17,800	89	52,100	25,100	828
Eastern Europe	3,500	82	24,000	18,900	69
Middle East & Africa	2,100	84	39,600	23,600	68
Asia	3,300	78	36,500	21,400	95
Oceania	2,400	87	66,200	26,400	139
Global	47,500	87	47,900	25,000	1,979

Revenue/income drivers

The key drivers of annual revenue/income from coaching - Fee per 1 hour coaching session, active clients and weekly hours working as a coach.

Drivers of annual revenue/income from coaching



The Coaching Profession: Size and Key Trends

Clients

In 2011, the average active coach had 10 clients. The regional pattern shows some variation, ranging from 8 per active coach in Eastern Europe to 12 in Oceania.

Client numbers per coach vary considerably more within regions. While a majority of active coaches (59%) have 6 or more clients, a substantial proportion (41%) were currently coaching fewer than 6 clients. Apart from Eastern Europe, where more than half (58%) said they have between 1-5 clients, a similar pattern holds across the major regions.

The more experienced coaches tend to have larger numbers of clients. In the 2011 survey, coaches with 10+ years of experience reported an average of almost 15 current clients compared with 5.4 among those who have been coaching for less than 1 year and 6.8 among those coaching for 1-2 years.

The linkage between experience and client numbers is perhaps indicative of the time that is required for aspiring coaches to build up a client base.

Number of clients

	Average Clients	1-5 clients %	6+ clients %
North America	11	37	63
Latin America & the Caribbean	10	39	61
Western Europe	10	43	57
Eastern Europe	8	58	42
Middle East & Africa	10	39	61
Asia	9	47	53
Oceania	12	33	67
Global	10	41	59

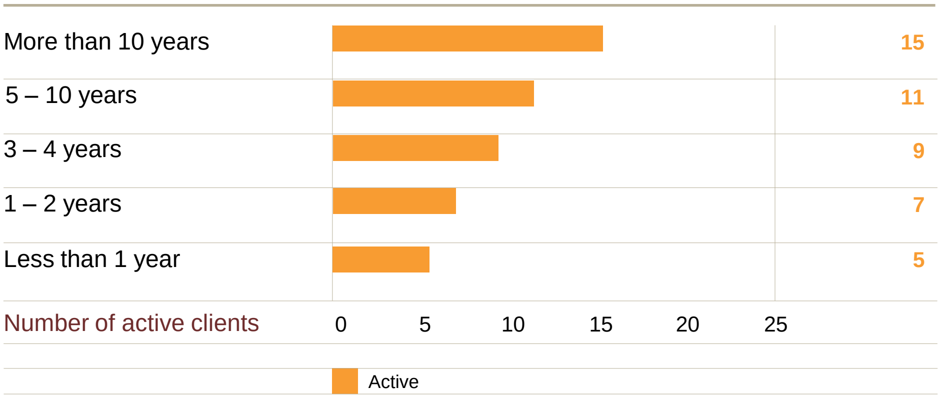
Other factors associated with higher numbers of clients include: the number of additional services offered in the coach's professional practice (e.g. training, facilitating); the proportion of sponsored clients (i.e. paid for by a third party); and, the length of a typical coaching engagement.

These factors also vary with years of coaching experience. The linkages will be further explored in the subsequent sections of this report.

Clients

The average number of clients varies with the coach's experience.

Average number of clients by coaching experience



The Coaching Profession: Size and Key Trends

Average fees reported per 1 hour session

Coaches with active clients were asked to report their average fee for a 1 hour coaching session. On a regional basis, there are considerable disparities in average fees reported per 1 hour session, ranging from $304 in Oceania to $142 in Latin America and the Caribbean.

Globally, one in two coaches said their fee per 1 hour session was less than $170 (the median). Across each of the world regions, median fees per 1 hour session were also below the average, typically by a margin of around 25%.

The variation in the reported fee per 1 hour session reflects a range of factors, including:

- The characteristics of the coach (e.g. external coaches and also the more experienced coaches tended to report higher average fees).
- The nature of the client (e.g. hourly fees per session tend to be higher for coaches who deal mainly with executives, business owners or managers, and lower for those mainly dealing with personal clients).

In practice, these factors overlap (e.g. the more experienced coaches are more likely to have executives as clients). These overlaps are further explored in section 5.

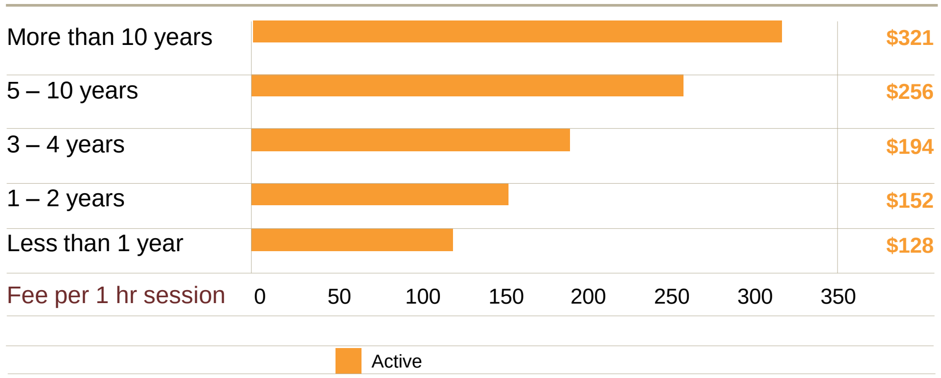
Reported average fee per 1 hour coaching session

	Average	Median
	US$	US$
North America	214	160
Latin America & the Caribbean	142	100
Western Europe	277	211
Eastern Europe	164	132
Middle East & Africa	163	114
Asia	239	147
Oceania	304	229
Global	229	170

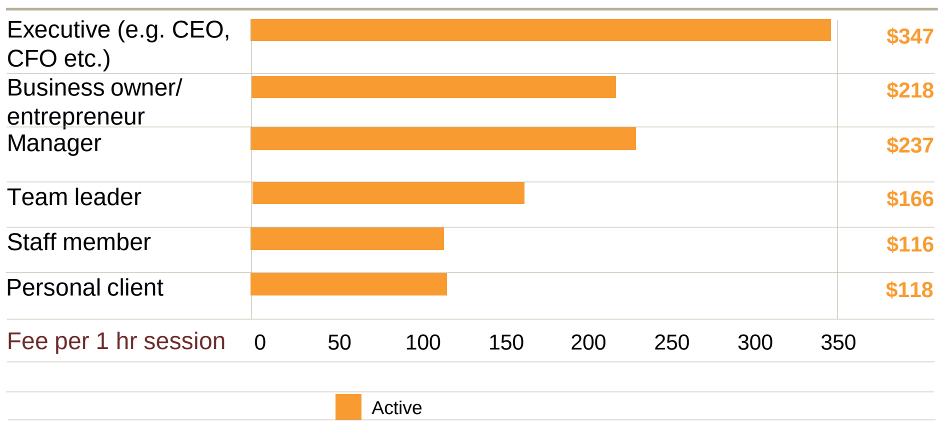
Average fees reported per 1 hour session

Fees reported per 1 hour coaching session vary with factors such as the coach's experience and the position held by the majority of the coach's clients.

Reported fee per 1 hour coaching session and years experience



Reported fee per 1 hour coaching session by position held by majority of coach's clients



The Coaching Profession: Size and Key Trends

Weekly hours working as a coach

On average, coaches spend 13 hours per week working as a coach, ranging from 8 hours per week in Eastern Europe to 15 hours per week in North America.

As measured by the median, the typical coach spends 10 hours per week working as a coach. Outside of Eastern Europe and Asia, the median does not vary greatly by region.

Whether measured by the average or the median, the number of active clients is the key driver of the weekly number of hours spent working as a coach. Coaches with 16+ clients worked an average of 22.6 hours per week, almost three times the average for those with 1-5 clients (7.7 hours).

The reported numbers of hours worked by coaches should be viewed in the context of the additional services that coaches offer. Almost all coaches surveyed indicated that they offered services in addition to coaching. On average, coaches offer almost three additional services (2.7); most commonly, consulting (62%) and/or training (60%).

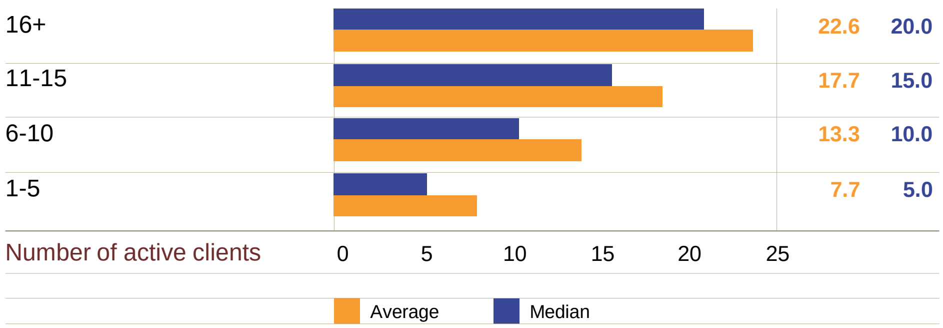
Hours per week working as a coach

	Mean	Median
	Hours	*Hours*
North America	15	10
Latin America & the Caribbean	14	10
Western Europe	12	10
Eastern Europe	8	5
Middle East & Africa	12	10
Asia	11	7
Oceania	14	10
Global	13	10

Weekly hours working as a coach

The number of active clients is a key driver of hours worked per week as a coach.

Hours per week working as a coach by number of active clients



Revenue/income recovered per hour

The fee per 1 hour coaching session refers to the amount reported by coaches for time spent with the client.

In addition, coaches would also need to devote additional hours of their time ‘working as a coach’ to activities such as session preparation, client maintenance activities, business prospecting/promotion and their professional development activities. It is also possible that, in practice, coaches do not always recover their full reported fee from client sessions.

Within that context, 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 coaches worldwide is an estimated $69. This is equivalent to 30% of the average fee for a 1 hour coaching session ($229).

This would in turn suggest that, for every one hour spent coaching the client, coaches must devote approximately two hours to the additional activities noted above.

Hourly revenue/income recovered (fee per 1 hour coaching session)

	US$	% of reported average fee
North America	65	30
Latin America & the Caribbean	48	34
Western Europe	81	29
Eastern Europe	57	35
Middle East & Africa	62	38
Asia	62	26
Oceania	90	30
Global	69	30

The Coaching Profession: Size and Key Trends

The coaching profession: Summary of revenue drivers

Annual revenue/income from coaching varies with the fees that coaches are able to charge per 1 hour coaching session, their active clients and the number of hours that they work.

These drivers are themselves inter-related, as hours worked per week varies strongly with the number of clients.

The revenue/income drivers are also affected by the attributes of the coach, such as years of experience, the type of client, and the region in which the coach works.

Summary of revenue drivers

	Average fee reported per 1 hour session	Average hourly revenue recorded	Hours per week (average)	Active clients currently coaching
	US$	*US$*	*Hours*	*Clients*
North America	214	65	15	11
Latin America & the Caribbean	142	48	14	10
Western Europe	277	81	12	10
Eastern Europe	164	57	8	8
Middle East & Africa	163	62	12	10
Asia	239	62	11	9
Oceania	304	90	14	12
Global	229	69	13	10

The Coaching Profession: Size and Key Trends

Key trends

When asked about their experience over the 12 months prior to the survey, respondents were more likely to report an increase than a decrease in fees, hours, clients and revenues. Overall, the positive balances in the trend indicators clearly point to a profession that is continuing to grow.

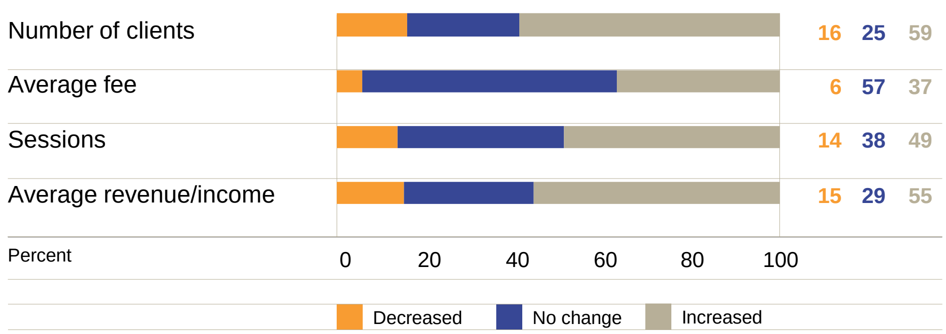
Almost six in 10 respondents with active clients said they had experienced an increase in the number of clients, compared to 16% saying their client numbers had decreased.

Respondents were less likely to say that average fees per 1 hour session had increased (37%), but this can be compared with just 6% reporting a decline. Similarly, coaches were more likely to say that the number of their coaching sessions had increased (49%) rather than decreased (14%).

The positive trends in clients, fees and sessions were clearly reflected in average revenues, with 55% reporting an increase compared to 15% saying annual revenue had declined.

Among coaches with increasing numbers of clients, 89% also said their annual revenue/income had increased in the last 12 months. Similar overlaps were reported for average fees (84%) and sessions (87%).

Change experienced – last 12 months



Note: The questions on trends in clients, fees, sessions and annual revenue/income were posed only to respondents saying they currently have active clients.

Number of clients: Trend

Increasing client numbers was a general trend across the profession. A substantial majority (59%) said they had experienced an increase in client numbers over the last 12 months.

Globally, fewer than one in five coaches reported a decrease (16%), giving a positive balance of +43 percentage points (pps) between those reporting an increase and those saying client numbers had fallen.

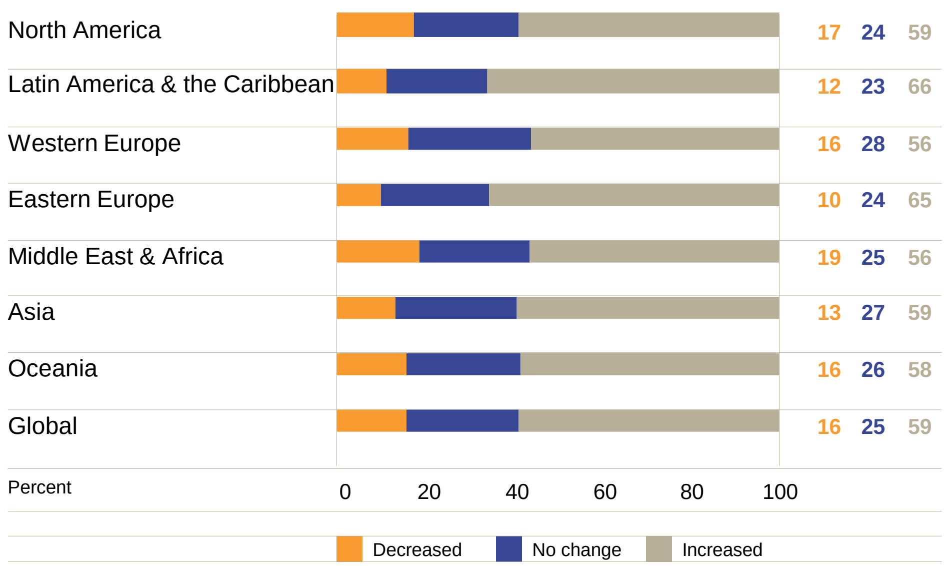
Increasing client numbers were reported across all regions, with Latin America and the Caribbean leading the way (66%) and Western Europe slightly lagging (56%).

Younger, less experienced coaches were more likely to report increasing client numbers compared to their more established colleagues.

Two in three coaches with 1-2 years experience (67%) said they had experienced an increase in the last year compared with one in two (51%) coaches having 10+ years experience.

This is not unexpected, since coaches at the outset of their careers are starting from a lower base of client numbers and will doubtless have expended more effort on gaining new clients.

Number of clients – last 12 months

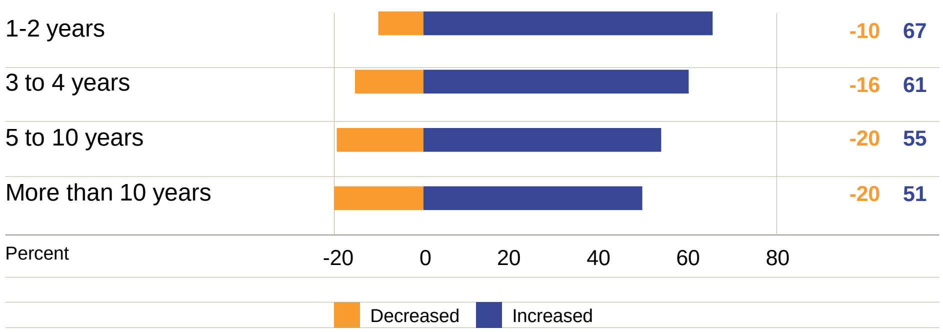


There were also some contrasts by type of client. Most notably, coaches relying mainly on personal clients were somewhat less likely to report an increase in clients (56%) compared to those who primarily coach executives (63%), business owners/entrepreneurs (61%) or managers (60%).

Clients: Experience last 12 months

Coaches at the beginning of their professional career were most likely to say their client numbers had increased within the last 12 months.

Number of clients: Experience last 12 months by years coaching experience



Base: Coaches with currently active clients and 1+ years of coaching experience.

Average fee for a 1 hour coaching session: Trend

The majority of coaches (57%) said their average fee per 1 hour coaching session had remained unchanged over the past year.

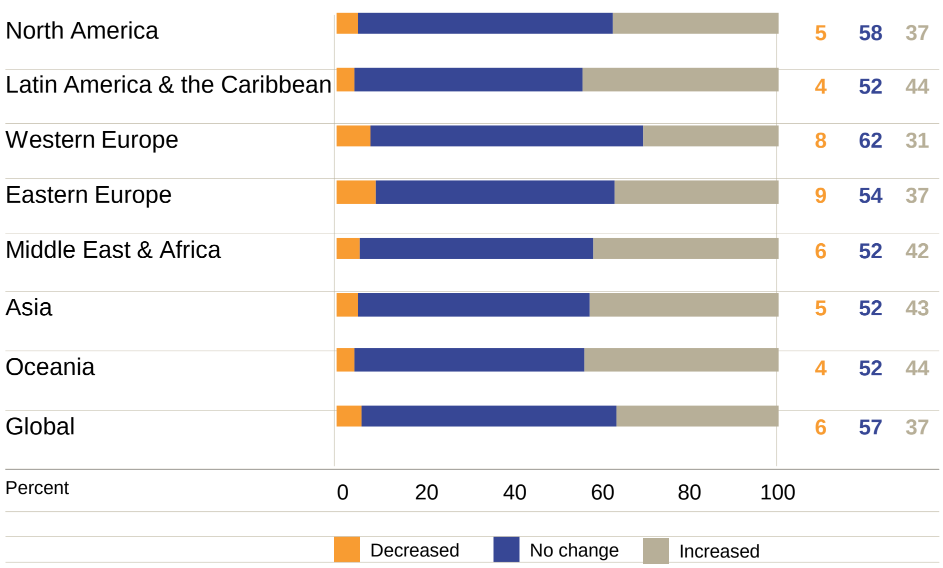
Nonetheless, there was still a positive balance between those reporting an increase (37%) and those reporting a decrease (6%).

A similar pattern was replicated across all of the world regions, albeit with some variations in the proportion of coaches saying average fees had risen.

Coaches in Western Europe were significantly less likely to report an increase (31%) compared with emerging markets such as Latin America and the Caribbean (44%) and Asia (43%).

Among the more mature markets, coaches in Oceania were most likely to say average fees had increased (44%).

Average fee for a 1 hour coaching session: Last 12 months



Number of coaching sessions: Trend

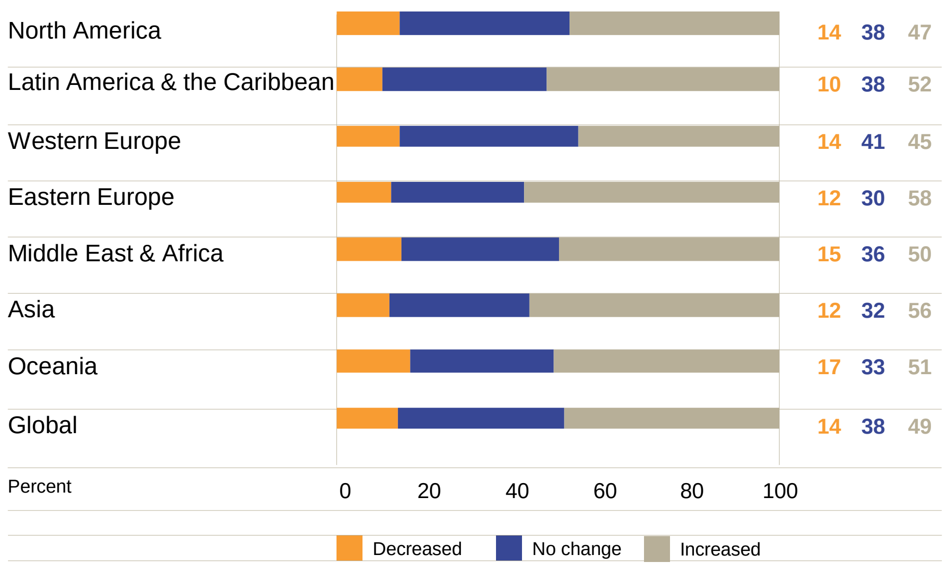
Almost one in two respondents (49%) said they had experienced an increase in the number of coaching sessions from the previous year.

Only 14% reported a decrease in the volume of coaching sessions. There was therefore a positive net balance of 35 pps between those reporting an increase and those saying the number of sessions had declined.

The positive balance was reported across each of the world regions, ranging from +31 pps in Western Europe (45% increase compared to 14% decrease) to +45 pps in Eastern Europe (58% compared to 12%).

As with the trend indicators reviewed previously, the emerging regions appear to have exhibited greater buoyancy in the growth of coaching sessions.

Number of coaching sessions: Last 12 months



The Coaching Profession: Size and Key Trends

Average annual revenue/income from coaching: Trend

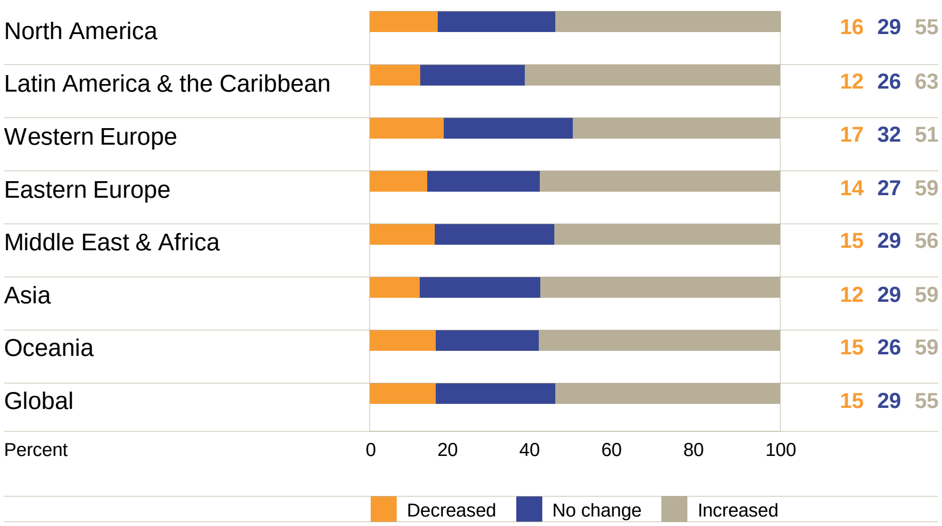
The regional pattern in annual revenue/income from coaching over the past 12 months is very similar to the trends in clients, fees and sessions.

Coaches in Latin America and the Caribbean were most likely to report an increase over the past 12 months (63%), followed by Eastern Europe (59%) and Asia (59%).

Among the high-income regions, Oceania again recorded a higher than average proportion reporting an increase (59% versus the global average 55%).

With just over one in two respondents reporting an increase (51%), Western Europe again lagged the global average. Both North America and the Middle East and Africa tracked the global trend.

Annual revenue/income: Last 12 months



When asked to indicate the approximate percentage increase or decrease in revenue/income from coaching over the past 12 months, almost one in five respondents (19%) reported an increase of more than 30%.

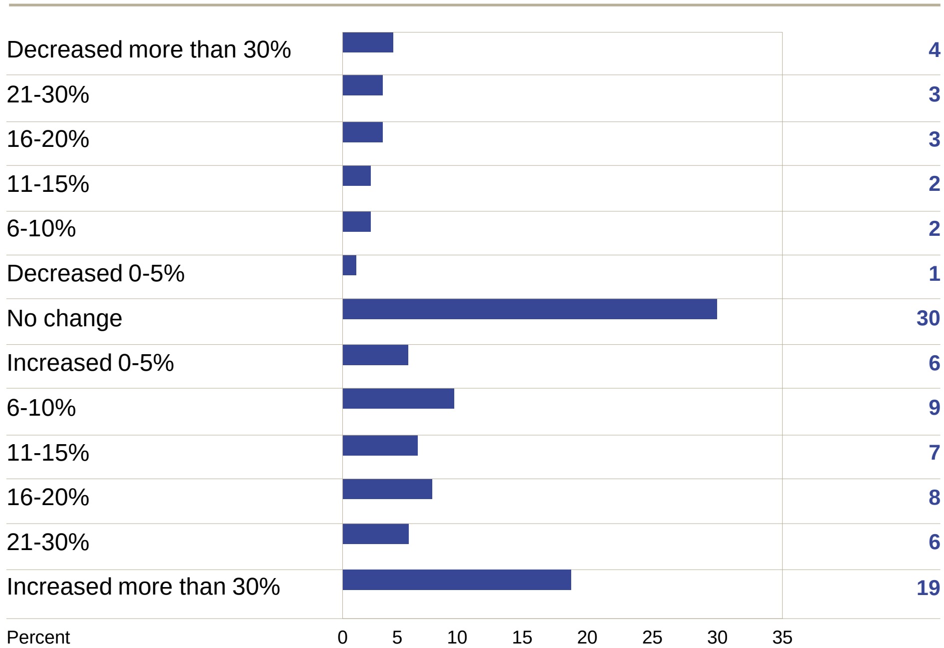
As measured by the proportion of coaches saying revenue/income had increased by more than 10%, the most buoyant market was Latin America and the Caribbean (48%), followed by Oceania (44%), Asia (42%) and Eastern Europe (42%).

Revenue growth was more muted in Western Europe, where 37% reported growth in excess of 10%. Both North America and the Middle East and Africa were in line with the global average (39%).

Average annual revenue/income from coaching: Percent change

Almost one in five active coaches said their annual revenue/income from coaching increased over 30% in the last 12 months.

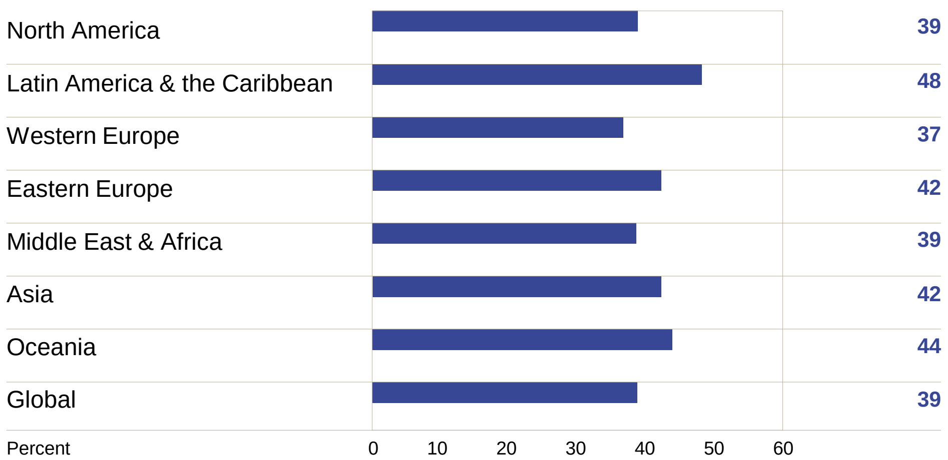
Annual revenue change



Average annual revenue/income from coaching: Percent change

Almost one in two coaches (48%) in Latin America and the Caribbean reported revenue/income growth in excess of 10%

Revenue/income growth in excess of 10%, last 12 months



The Coaching Profession: Size and Key Trends

Trends by world region

The study evidence points to the fact that the trend indicators have been growing more quickly outside the high-income regions.

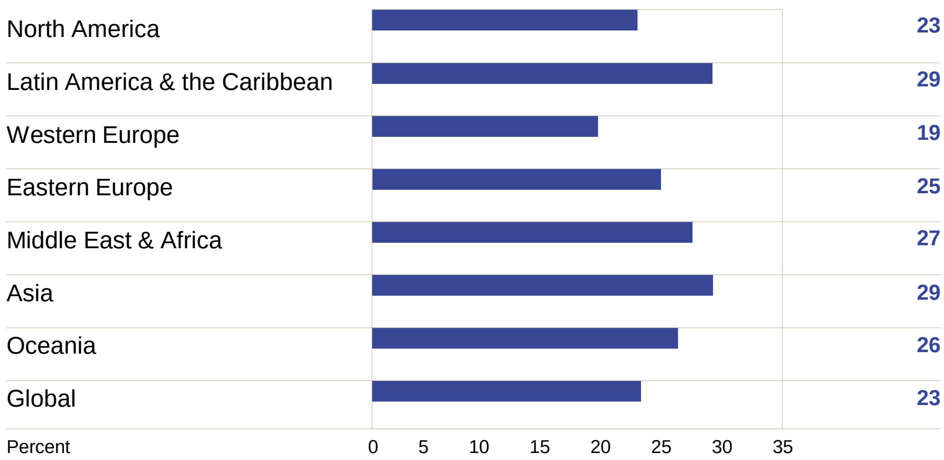
In both Latin America and the Caribbean and Asia, 29% of coaches said they had experienced growth across all four trend indicators in the previous 12 months (i.e. clients, fees, sessions and revenues).

Compared to the global average of 23%, coaches in the Middle East and Africa (27%) and Eastern Europe (25%) were also more likely to report an increase on all four trend indicators.

Oceania was the only high-income region where a higher than average proportion of coaches reported an increase across all four indicators in the last 12 months (26%).

By contrast, the slowest growing region was Western Europe, where fewer than one in five coaches (19%) reported an increase across all four key indicators.

Experienced increase last 12 months on all key trends



Looking ahead

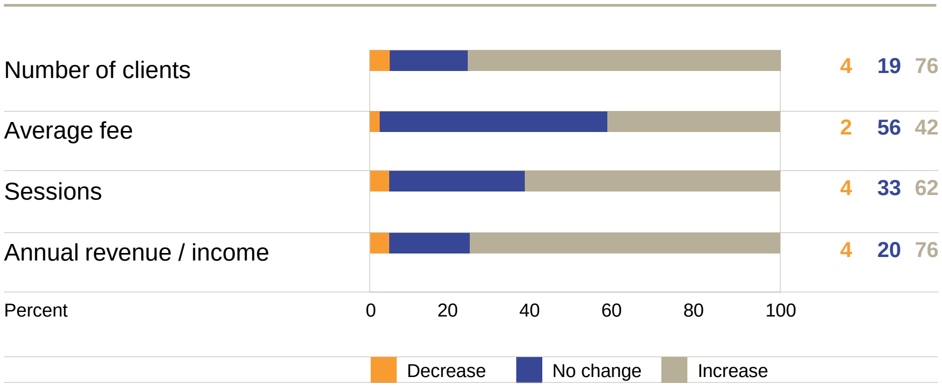
In general, the coaches who responded to the survey view their prospects over the next 12 months in a positive light and are looking ahead with confidence.

More than three in four expect their number of coaching clients to increase. A similar proportion anticipates an increase in annual revenue/income from coaching.

Over six in 10 (62%) expect their number of coaching sessions to rise. Coaches are somewhat less confident of an increase in average fees (42%). However, very few coaches (2%) expect average fees to decline.

The general pattern in the global picture is apparent across each of the world regions. Similar to the trends over the past 12 months, the proportion of coaches anticipating increases in clients, fees and sessions tends to be higher in the emerging than in the high-income regions.

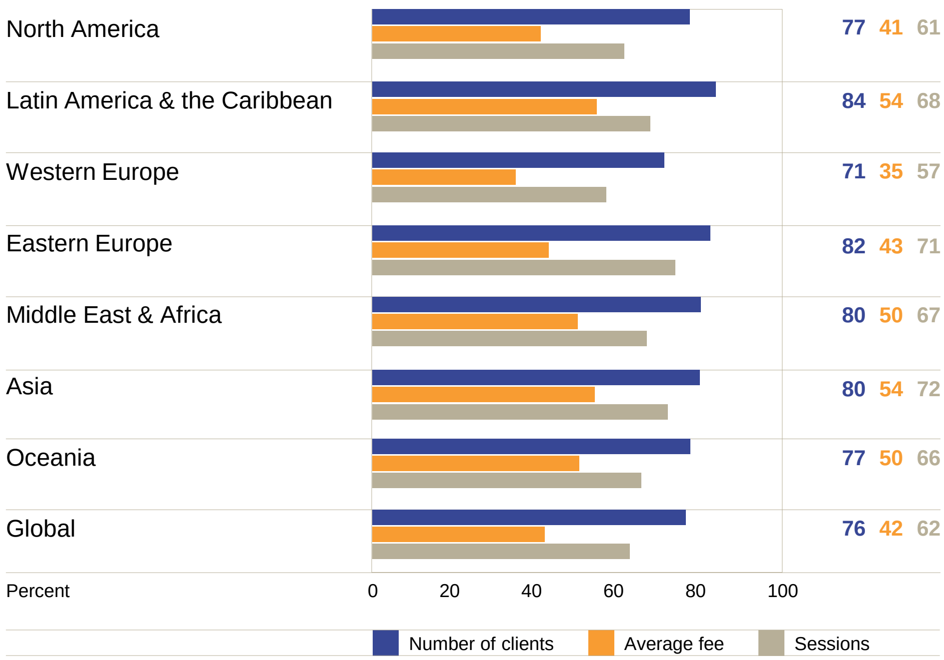
Change expected – next 12 months



Looking ahead: The regional pattern

Across all regions, most coaches are expecting continued growth in number of clients and sessions.

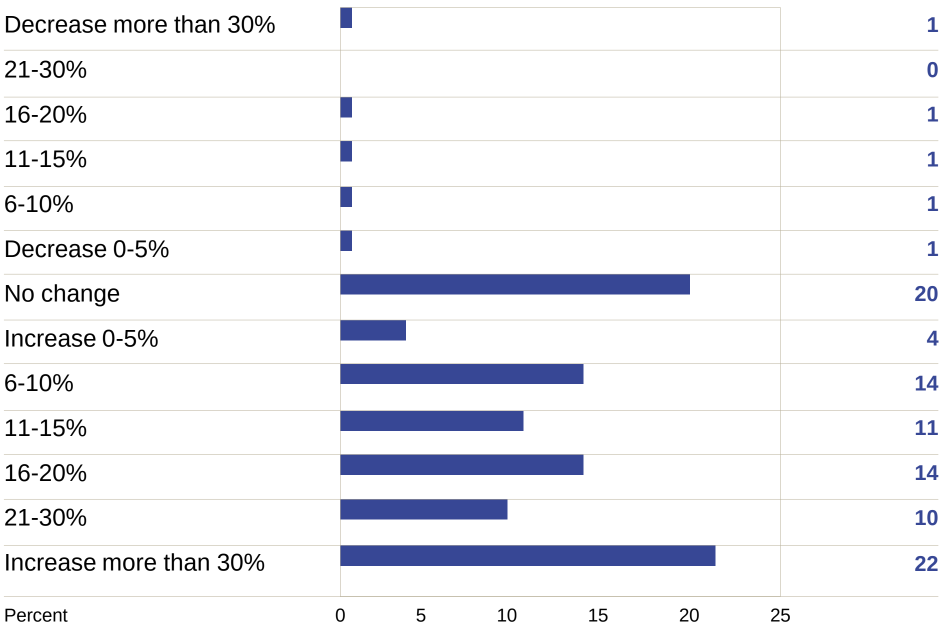
Expected increase during the next 12 months



Looking ahead: Annual revenue/income

Regarding the anticipated percentage revenue change, over one in five respondents (22%) said they expected 30% or more. The less experienced coaches were especially optimistic; almost half (48%) of all active coaches with less than 2 years experience projected revenue growth in excess of 30%, compared with 20% of coaches with 5+ years experience. This may reflect that younger coaches are in the growth phase of their business development.

Expected revenue/income change, next 12 months

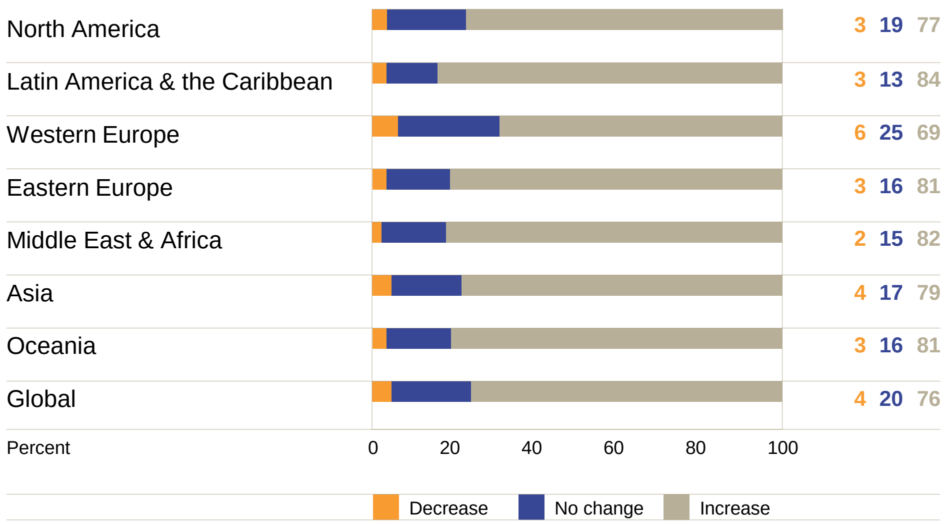


Looking ahead: Annual revenue/income

When asked about their future expectations regarding revenue/income, coaches located in Latin America and the Caribbean, Eastern Europe, the Middle East and Africa, and Asia, are looking forward to the next 12 months with greater confidence than their counterparts in the high-income regions.

For example, 84% of coaches in Latin America and the Caribbean expect to see an increase in annual revenue over the next 12 months compared with 69% in Western Europe.

Annual revenue/income: Next 12 months



The Coaching Profession: Size and Key Trends

Key points summary

The following are the key themes to emerge from the *2012 ICF Global Coaching Study* results for the size of the profession and key trends:

- The growing scale of the profession, with 47,500 professional coaches and annual revenue/income close to $2 billion.
- The profession remains highly concentrated in the high-income regions of North America, Western Europe and Oceania. Collectively, these regions contain over three in four coaches, well in excess of their 11% share of global population.
- Nonetheless, the evidence from the study indicates faster growth in emerging markets outside the high-income regions. These markets are acquiring a cadre of professional coaches who are building the experience needed to more firmly establish and develop the profession within their home countries.
- There is considerable variation within the coaching profession along a number of dimensions, including levels of income from coaching, hourly fee levels, weekly hours coaching and client numbers.
- Partly, this reflects the diversity in the coaching profession. Professional coaches address a wide range of client concerns in a variety of different contexts, while also offering a mix of additional services to meet client needs.
- Coaches are looking confidently to the future, with expectations of increasing demand (clients and sessions), ultimately leading to growth in annual revenue and income from coaching.

Section 3

Profile of Coaches

Profile of Coaches

Introduction

The section commences with an overview on the demographics of the coaching profession, presenting the survey findings for age, gender, level of education and years of coaching experience.

The section then focuses on coaches' position within the marketplace, in regards to the following headings:

- External and internal coaches.
- Main areas of coaching, distinguishing in particular between business-focused and other coaching specialties.
- Additional services offered.

The remainder of the section examines variations in annual revenue/income from coaching and the key business indicators with reference to the demographic profile of coaches and the mix of services that they offer.

The section concludes with a key points summary.

Profile of Coaches

Age profile

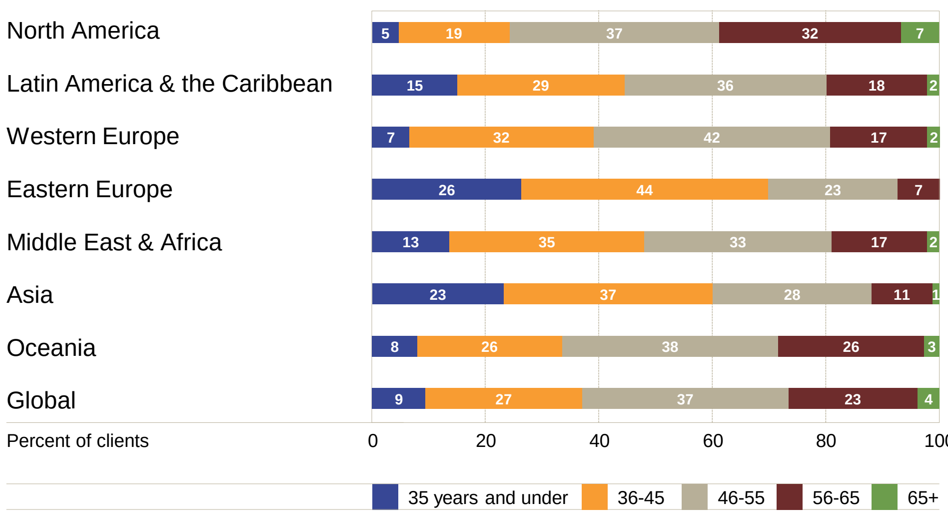
The age profile of coaches in 2011 was very similar to what was observed in 2006, when the *2007 ICF Global Coaching Study* was undertaken.

As in 2006, those aged 46-55 account for the largest share of professional coaches (37%, compared with 39% in 2006). In 2011, almost three in 10 coaches (27%) were in the age range 36-45, compared with 30% in 2006.

In 2011, fewer than one in 10 coaches (9%) were aged 35 years or under, compared to 7% in 2006.

The age profile of coaches shows some variation by region. In particular, the proportion of younger coaches is above average in the emerging regions. Approximately one in four coaches is aged 35 and under in both Eastern Europe (26%) and Asia (23%). In Eastern Europe, 70% of coaches are aged 45 and under, compared to a global average of 36%.

Age profile by region



Profile of Coaches

Gender

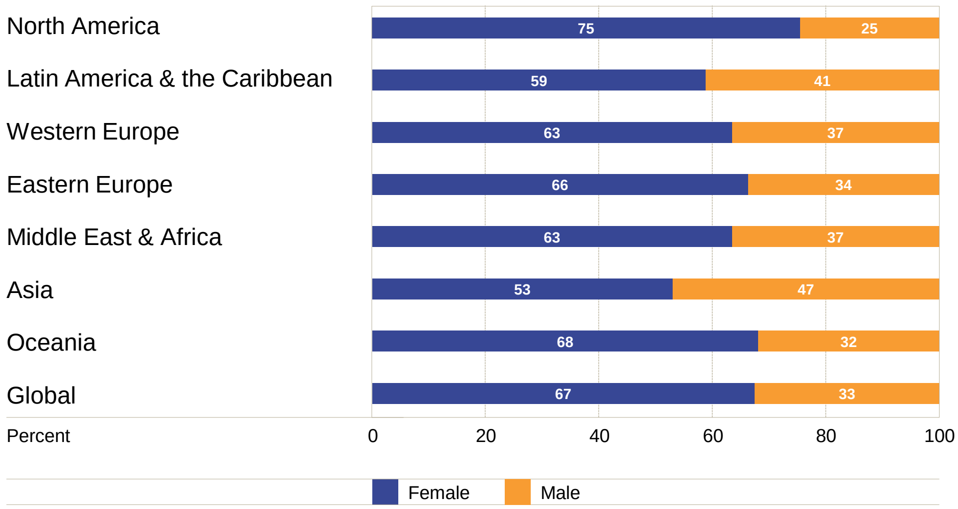
In 2011, the majority of coaches (67%) were female, compared with 69% in 2006.

Regionally, the female share is highest in North America (75%), significantly above the global average of 67%.

The female share tends to be lower in emerging markets; most notably Asia (53%) and Latin America and the Caribbean (59%).

Globally, the age profiles of male and female coaches are broadly similar. Male coaches have a slightly older profile; 31% of male coaches are aged over 55 years compared with 24% of females.

Gender by region



Level of education

Coaches are becoming more highly educated, as evidenced by the rising trend in the proportion of coaches with advanced, or third level, degrees such as a Masters or a Ph.D.

In 2006, 53% of coaches said they had been educated to third level. By 2011, 60% of coaches said they had been educated to third level.

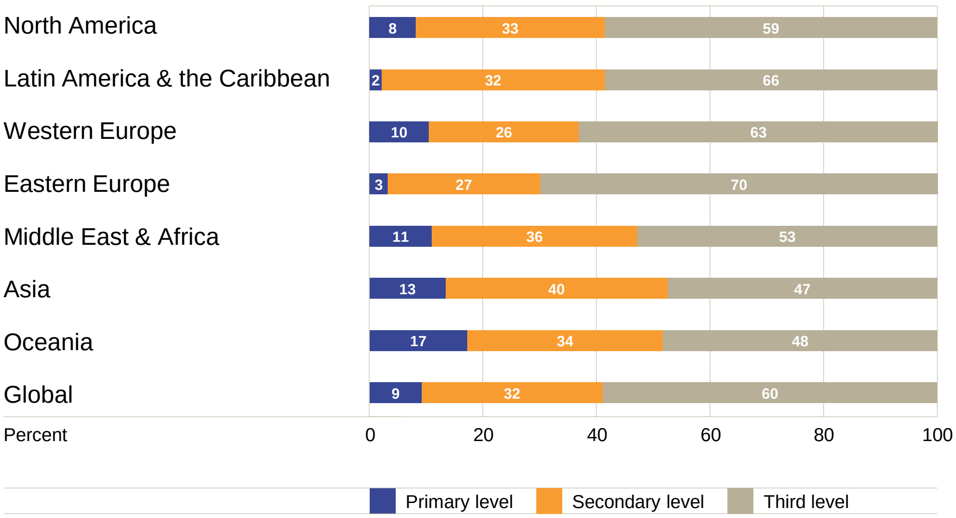
The increase in the number of coaches with third level education was reflected in a reduction in the proportion of coaches with primary level education (completed education before university).

This was 9% in 2011 compared with 12% in 2006. There was a similar reduction in the proportion of those educated to secondary level (holds a Bachelor's degree). Their share was 32% in 2011 compared with 35% in 2006.

Currently, the proportion of coaches with more advanced degrees is highest in Eastern Europe (70%) and Latin America and the Caribbean (66%) and lowest in Asia (47%) and Oceania (48%).

Coaches aged over 55 were more likely to hold an advanced degree (64%) compared to those aged 35 and under (51%) and also those in the 36-55 age range (59%).

Education by region



As in other professions, this may reflect the accumulation of additional qualifications as coaches seek to expand their expertise in the areas of coaching in which they specialize.

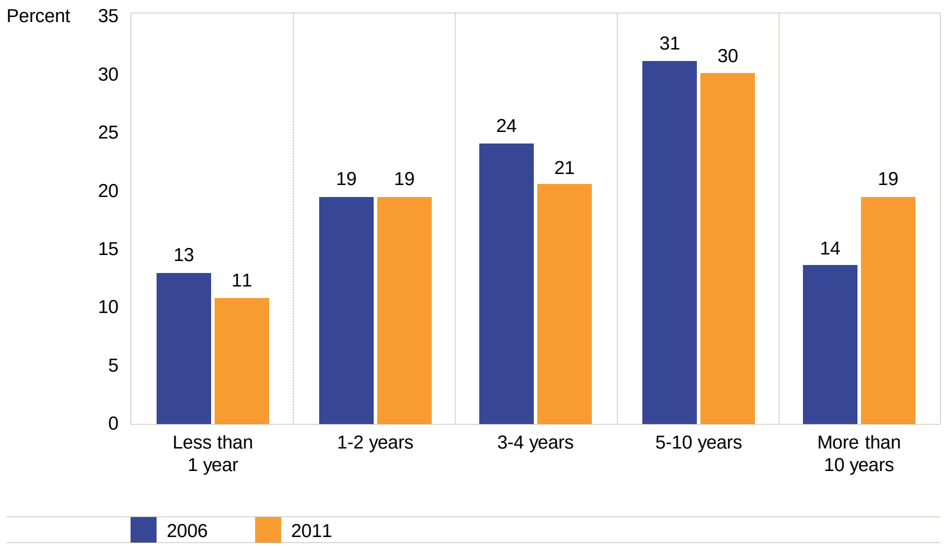
Profile of Coaches

Length of time coaching

As the profession matures, coaches are becoming more experienced. In the 2011 survey, almost one in five coaches (19%) reported having at least 10 years experience which compares to 14% in 2006.

Almost one in two coaches (49%) now have five or more years experience, compared to 45% in 2006.

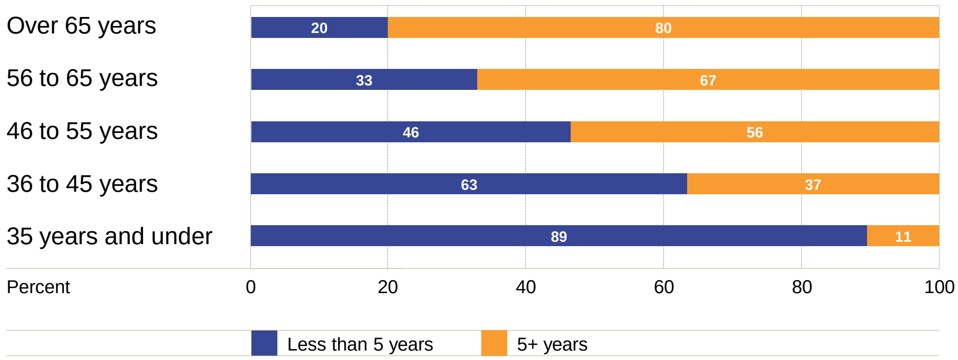
Coaching experience



Not unexpectedly, the prevalence of coaches with 5+ years of experience is strongly age-related, ranging from 80% among those aged 65+ to 11% of coaches aged 35 or under.

Reflecting their older age profile, male coaches are somewhat more likely to have 5+ years experience, with 51% of male coaches saying they have 5+ years experience compared to 48% of female coaches.

Coaching experience by age



Profile of Coaches

Length of time coaching

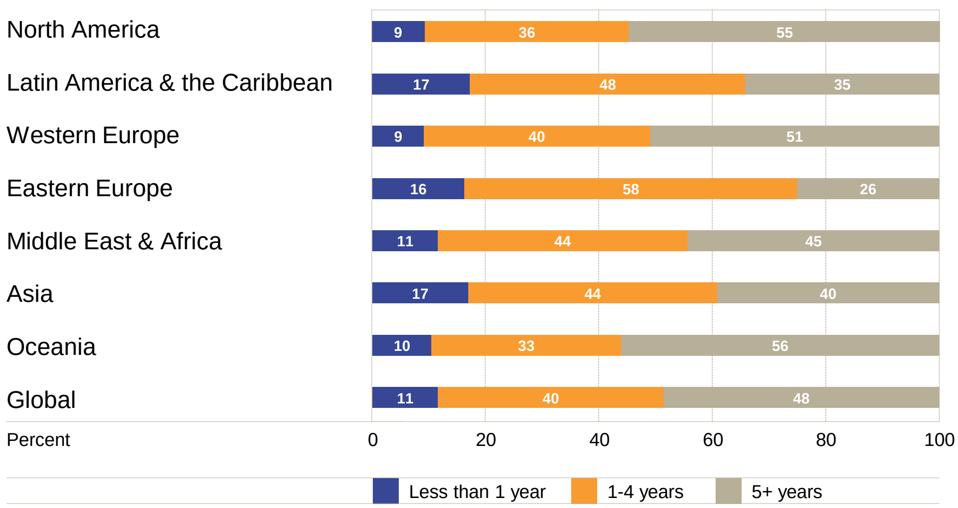
Length of time coaching is also relevant as an indicator of geographical variations in the maturity or level of development of the market for coaching.

Globally, almost half of all respondents to the survey indicated they had been coaching for 5 or more years (49%). The proportion varies strongly by region, from 56% in Oceania to 26% in Eastern Europe.

Broadly speaking, the proportion of coaches who have been practicing for 5 or more years is highest in the more developed high-income regions (i.e. North America, Western Europe and Oceania).

As the emerging regions gain in maturity, the representation of coaches with 5 or more years of experience will also increase.

Coaching experience by region



Profile of Coaches

External and internal

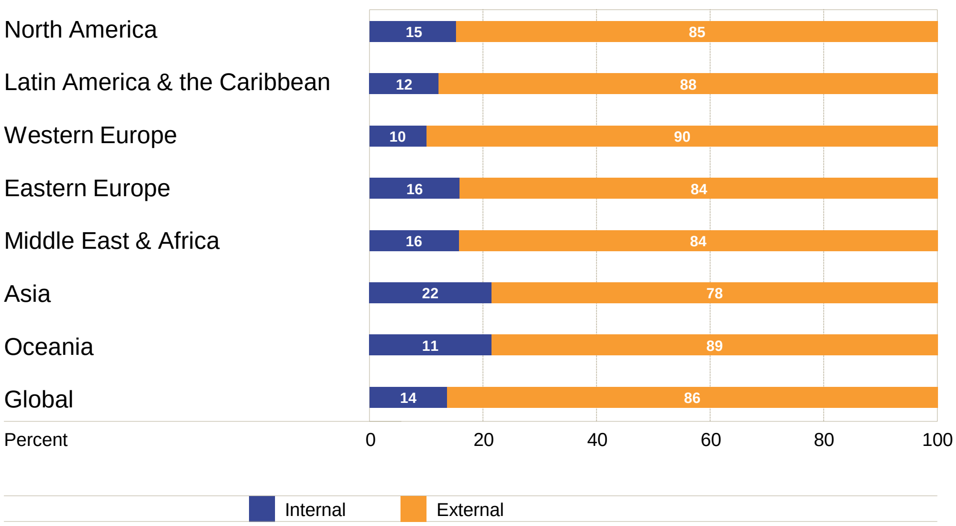
Overall, the vast majority of respondents (86%) said they are external coaches (they are self-employed or partner with other professional coaches in a coaching business). The remaining 14% said they are internal coaches (professional coaches who are employed within an organization and who have specific coaching responsibilities identified in their job description).

External coaches were more likely to have been actively coaching clients at the time of the global survey (88%) compared to internal coaches (80%).

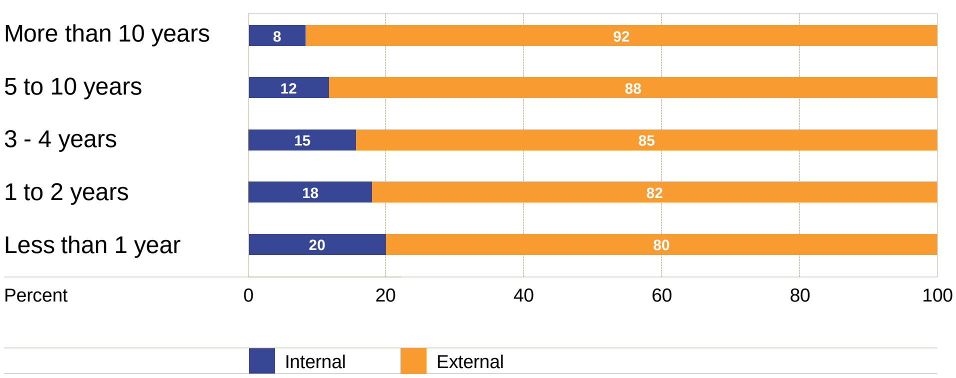
Regionally, the external share varies from 78% in Asia to 90% in Western Europe.

The likelihood of being an internal coach also varies with years of experience, from 8% of those with 10+ years of experience to 20% with less than 1 year experience. This may reflect an increasing incidence of coaching within organizations, providing opportunities for younger coaches within the profession.

External and internal coaches by region



Internal and external by coaching experience



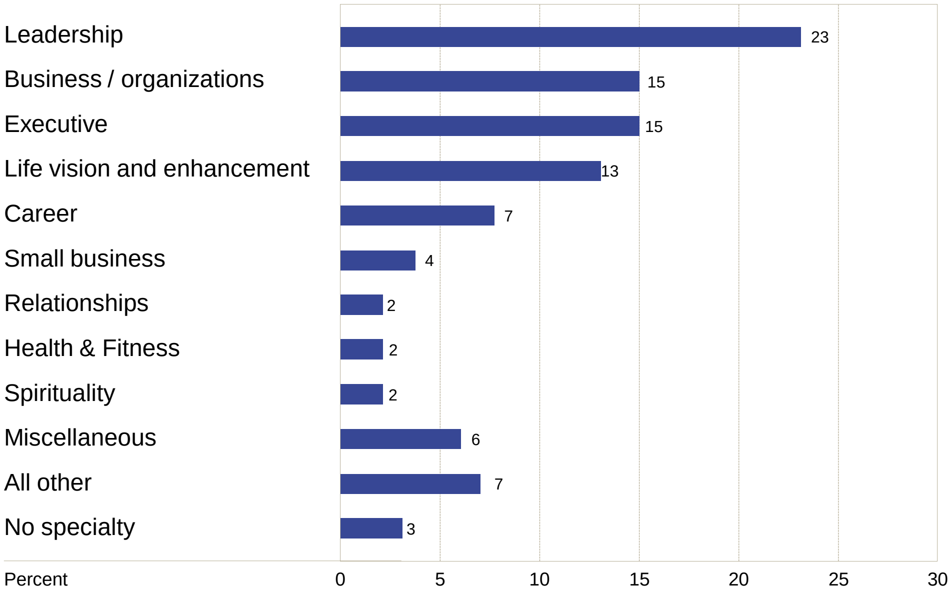
Profile of Coaches

Main areas of coaching

The main coaching specialties mentioned by respondents cover a broad spectrum. Most frequently, respondents said their main area of coaching is leadership (23%), followed by business/organizations (15%) and executive coaching (15%). In 2006, these three coaching specialties were also among those most frequently mentioned by respondents.

The three main coaching specialties cited most often are all business-focused. In the remainder of this report, these three areas, plus the small business specialty, will be referred to as business coaching. Globally, 58% of coaches mentioned a business coaching specialty as their main area of coaching.

Main area of coaching

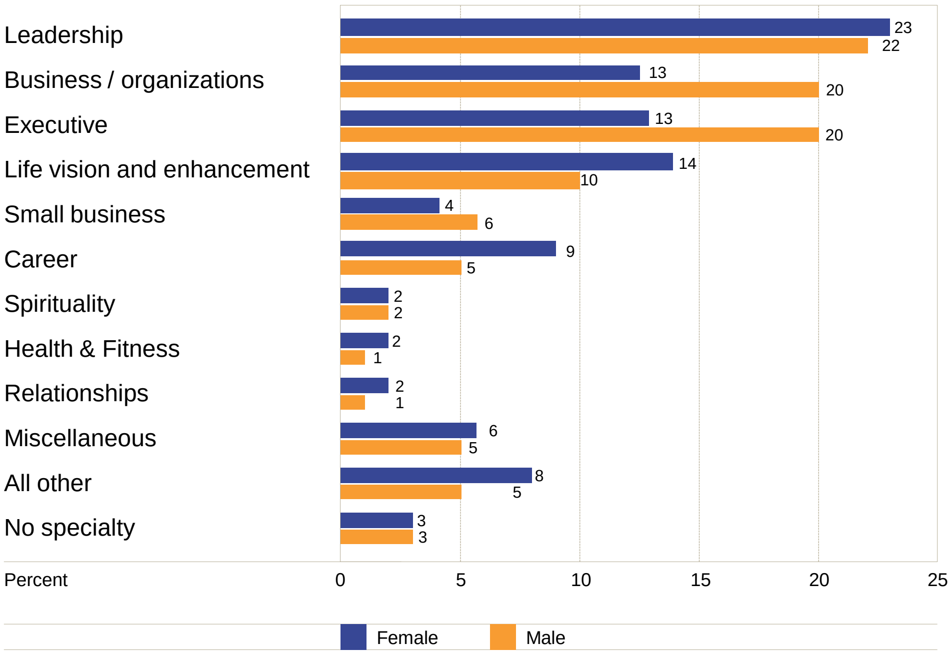


Main areas of coaching

Similar to the results that were collected in 2006, the main coaching specialties are strongly differentiated by gender. While the incidence of leadership coaching varied little by gender, females were significantly less likely than males to mention the remaining business-focused specialties. Over two in three males (68%) cited one of the four business-focused specialties as their main area of coaching, compared with 53% of females.

Conversely, female coaches were more likely than males to cite one of the non-business focused specialties, such as life vision and enhancement.

Main area of coaching, by gender



Profile of Coaches

Main areas of coaching

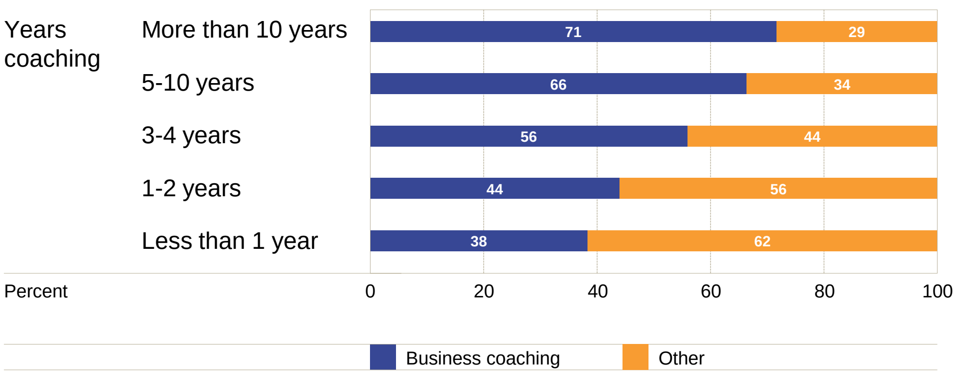
The prevalence of business coaching specialties is also significantly related to years of coaching experience. As can be seen from the accompanying chart, the more experienced coaches are also the most likely to specialize in business coaching.

Business coaching varies in a similar fashion by age, from 38% of those aged 35 years and under to 61% among coaches aged 56 and over.

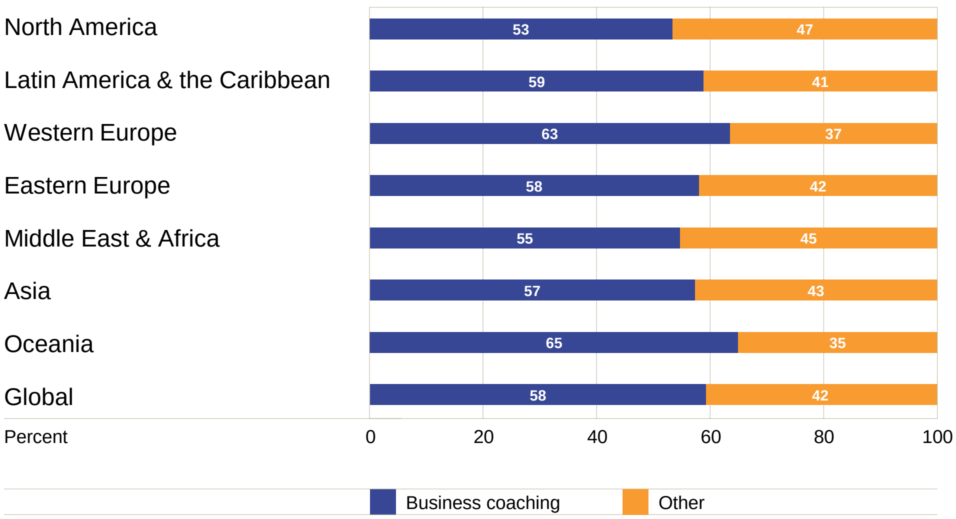
Level of education was also significantly associated with the incidence of business coaching, ranging from 45% among those educated to primary level to 62% where the coach is educated to third level.

The split between business and other coaching specialties also varied by region. Coaches in Oceania (65%) and Western Europe (63%) were significantly more likely than their counterparts in North America (53%) to list a business coaching specialty as their main area of coaching.

Main coaching speciality by experience



Main areas of coaching by region



Profile of Coaches

Coaching specialties by region

Compared to other regions, coaches in Latin America and the Caribbean and Eastern Europe were much less likely to mention leadership as a specialty and more likely to cite business/organization coaching.

This may reflect differences across regions in how particular coaching specialties are perceived.

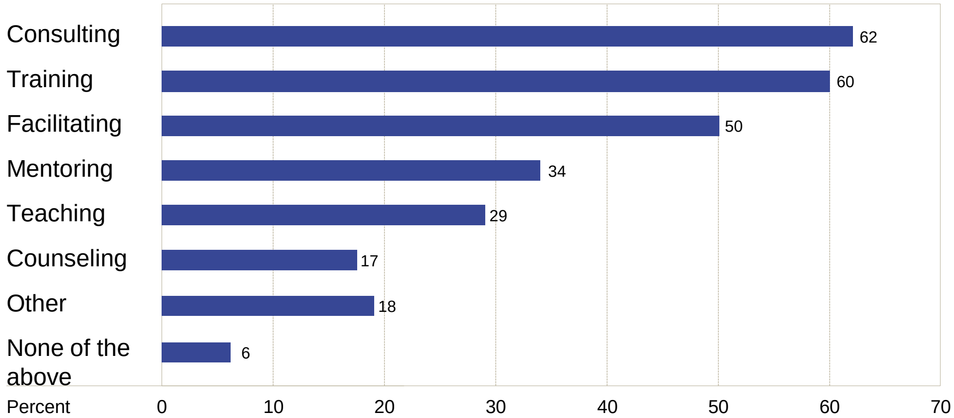
	North America	Latin America & the Caribbean	Western Europe	Eastern Europe	Middle East & Africa	Asia	Oceania	Global
	%	%	%	%	%	%	%	%
Leadership	26	12	21	17	21	24	27	23
Business/Organizations	9	24	21	23	15	15	12	15
Executive	13	21	17	14	13	15	19	15
Small Business	5	2	4	4	6	2	6	4
Life Vision & Enhancement	14	16	10	17	16	13	10	13
Career	7	4	9	9	5	6	6	7
Relationships	2	2	1	3	4	3	2	2
Health & Fitness	3	1	1	0	0	2	2	2
Spirituality	2	2	0	1	2	2	2	2
Miscellaneous	6	5	4	5	8	9	5	6
All other	9	5	6	4	5	4	6	7
No speciality	2	6	3	3	4	5	3	3

Additional services offered

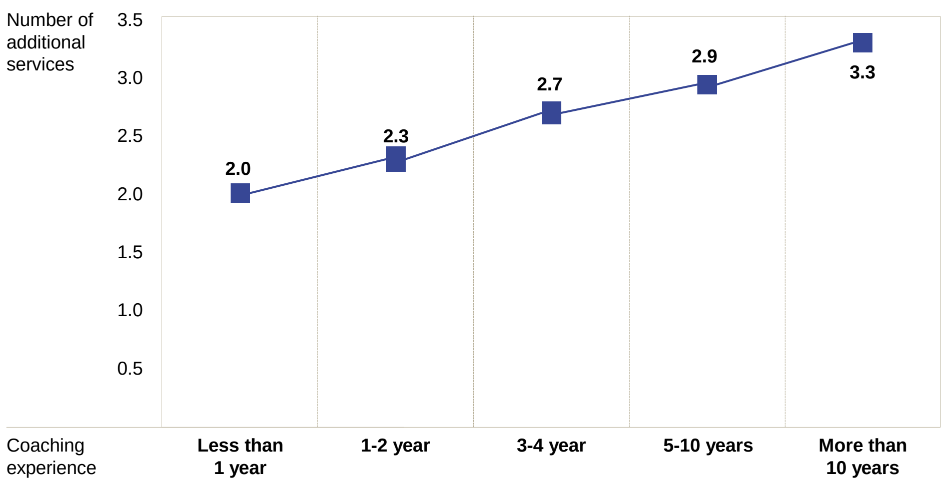
Almost all coaches (94%) indicated that they offer one or more services in addition to coaching within their professional practice. Consulting (62%) and/or training (60%) were the additional services mentioned most frequently, followed by facilitating (50%), mentoring (34%) and teaching (29%). The proportion of coaches offering additional services does not vary greatly by region, ranging from 91% in the Middle East and Africa to 95% in Western Europe and Oceania. Nonetheless, there is some differentiation in the mix of services offered by region. Coaches in Asia (30%) and Latin America and the Caribbean (28%) were most likely to mention counseling. Facilitating was mentioned most often by coaches in Oceania (62%) and North America (56%).

On average, coaches offer almost three (2.7) services in addition to coaching. In general, the more experienced the coach, the greater the number of additional services they offered; ranging from an average of two (coaches with less than 1 year of experience) to 3.3 (coaches with 10+ years of experience). The more experienced coaches are therefore able to bring a range of skills to address the issues that arise in their professional practices. This would suggest that the acquisition of additional services is likely to be part of the career progression path for younger coaches.

Additional services offered



Number of additional services offered: Average by coaching experience



Summary business indicators: Demographic profile

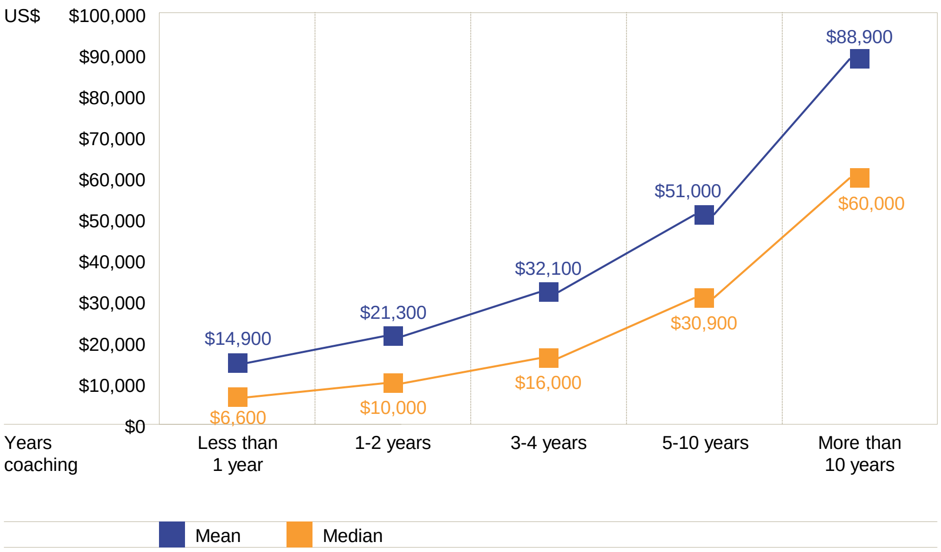
The revenue/income received from coaching depends on a variety of factors, including attributes of the coach, the range and mix of services offered and the nature of the client. These factors are often inter-related. For example, coaching experience is positively associated with the likelihood of specializing in business coaching.

When these factors are examined together, years of experience emerges as the single most important predictor of a coach's income/revenue from coaching. Coaching experience is also strongly linked to variations in hourly fee per coaching session.

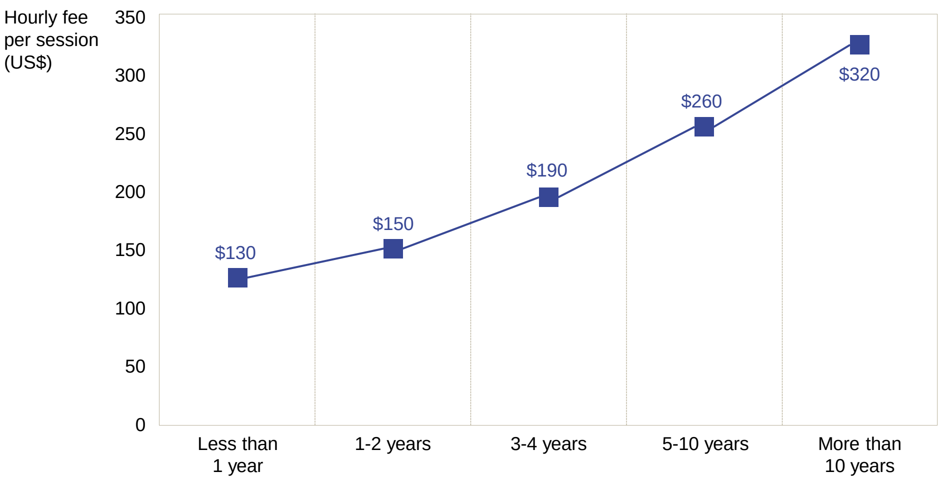
As shown in the table on the next page, number of clients and hours worked also vary considerably by coaching experience, but not greatly by the gender and age of the coach.

Fees and revenues are both positively linked to age among coaches aged under 65. However, that is entirely due to the link between age and years of coaching experience. There is no independent effect from age over and above the effect of years of experience.

Annual revenue from coaching



Hourly fee per session by coaching experience



Profile of Coaches

Summary business indicators: Demographic profile

		Annual revenue	Reported 1 hour fee	Clients	Hours
		US$	*US$*		
Gender	Female	41,300	210	10	13
	Male	60,600	260	11	14
Age	Less than 36 years	24,700	140	8	10
	36 to 45 years	40,600	210	10	13
	46 to 55 years	51,900	240	11	14
	56 to 65 years	56,400	260	11	14
	Over 65 years	46,500	230	11	14
Experience	Less than 1 year	14,900	130	5	8
	1 to 2 years	21,300	150	7	10
	3 to 4 years	32,100	190	9	12
	5 to 10 years	51,000	260	11	14
	More than 10 years	88,900	320	15	18

Summary business indicators: Coaching services

Coaches whose main area of coaching is business-focused tend to have higher levels of revenue/income from coaching compared with the other main specialties.

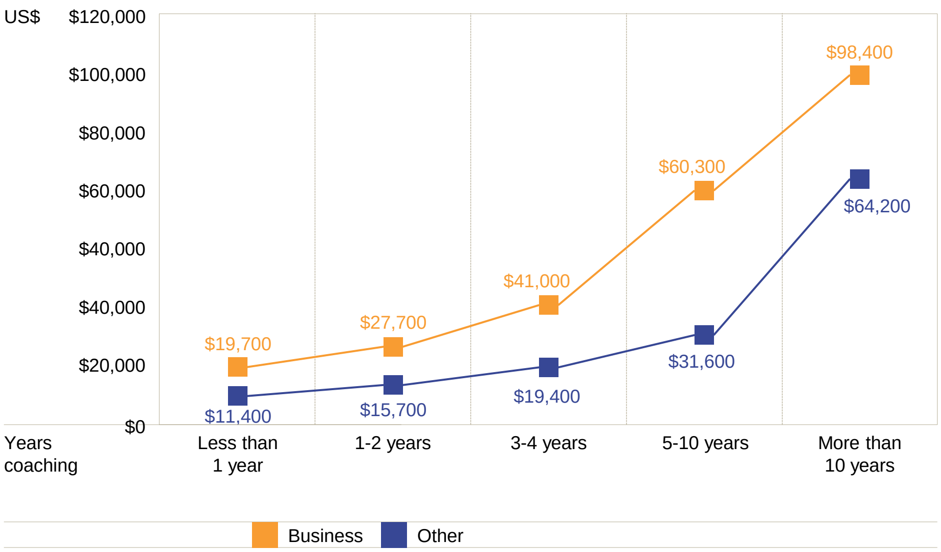
Partly, this reflects the linkage between years of experience and the likelihood of specializing in a business-focused area. As can be seen from the accompanying chart, at each level of coaching experience, coaches with a business-focused specialty tend to earn more than other coaches.

The higher annual revenue/income from business-focused specialties is also driven by a higher average fee per one hour coaching session ($280) compared to other coaching specialties ($150). Number of clients and hours worked vary much less within coaching specialties.

Revenue/income and average fees also vary with the number of additional services offered by the coach.

However, this mainly reflects the linkage between years of coaching experience and numbers of additional services (see page 55).

Annual revenue from coaching by specialty and years of experience



That is, revenue rises with the number of additional services because the more experienced and more highly remunerated coaches also tend to offer a higher number of additional services in their professional coaching practice.

As can be seen from the table on page 57, the average female coach reported an annual revenue/income level (US$41,300) that was one-third lower than their male counterparts (US$60,600).

Male coaches are more likely than female coaches to have a business-focused coaching specialty. Because such specialties have above-average revenue levels, differences between men and women in the mix of coaching specialties is likely to explain at least part of the gender gap in annual revenue/income from coaching.

However, the revenue gap between male and female coaches is likely to reflect a range of factors and a fuller explanation is beyond the scope of this study.

Profile of Coaches

Summary business indicators: Coaching services

		Annual revenue	Reported 1 hour fee	Clients	Hours
		US$	*US$*		
Internal/external	Internal	30,300	140	11	12
	External	49,900	240	10	14
Main area of coaching	All business	60,300	280	11	14
	- Leadership	57,300	280	11	13
	- Business/Organizations	55,700	260	10	14
	- Executive	71,600	320	11	14
	- Small Business	51,100	220	10	16
	Other	28,200	150	9	12
	- Life Vision and Enhancement	19,300	130	8	11
	- Career	33,100	160	10	12
	- All other	31,800	160	10	13
Additional services	None	38,000	190	9	12
	One	41,000	210	9	12
	Two	46,300	220	9	13
	Three	47,900	240	10	13
	Four or more	54,300	250	12	14

Annual revenue/income from coaching

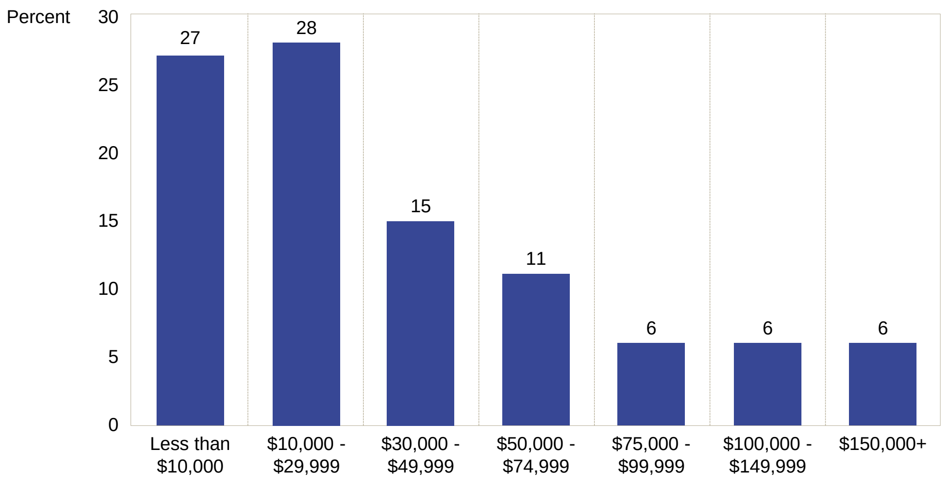
This section has illustrated the diversity that exists within the coaching profession, such as years of coaching experience, coaching specialties and number of additional services offered.

Reflecting the diversity within the profession, coaches vary in the number of clients they coach, the fees they charge per one hour coaching session and the hours they work

Within that context, and bearing in mind that survey respondents were not asked to give their revenue/income from all sources, it can be observed that annual revenue/income from coaching varies widely.

Over one in two coaches (55%) reported less than $30,000 annual revenue/income from coaching. Almost one in three coaches (32%) indicated that their annual revenue/income was in the range $30,000 to $99,999. The remaining 12% reported annual revenue/income of $100,000 or more.

Annual revenue



Profile of Coaches

Key points summary

The following are the key themes to emerge from the *2012 ICF Global Coaching Study* results for the size of the profession and key trends:

- The age and gender profile of coaches in 2011 remains very similar to the results that were collected in 2006, when the first ICF Global Coaching Survey was undertaken.
- Two in three coaches are female. Globally, the majority of coaches are aged 46 and over (63%). The age profile of coaches is younger in Eastern Europe and Asia.
- Coaches are becoming more highly educated, with a rising trend in the proportion possessing an advanced degree (e.g. Masters or Ph.D.), up from 53% in 2006 to 60% by 2011.
- The coaching profession is growing in maturity, with an increasing share of coaches having 10 or more years of experience; 19% in 2011 compared with 14% in 2006.
- The proportion of coaches with 5+ years of experience is highest in the more developed high-income regions (i.e. North America, Western Europe and Oceania).
- Length of time coaching is strongly and positively associated with average fee levels and this should act to promote a degree of convergence in average coaching incomes across regions.
- Similar to when data was collected in 2006, business-focused specialties were again the most frequently mentioned main areas of coaching in 2011. The more experienced coaches are more likely to specialize in business-focused areas. Male coaches are also more likely to specialize in business-focused areas.
- Almost all coaches (94%) offer at least one or more services in addition to coaching in their professional practices.
- Revenue/income from coaching varies sharply across the demographic indicators and according to the main areas of coaching.
- Among the profile indicators, coaching experience is the single most important predictor of a coach’s income/revenue from coaching.
- Coaches with a business-focused specialty also tend to have above-average incomes, reflecting a higher average level of fees per 1 hour coaching session.

Section 4

Training and Accreditation

Training and Accreditation

Introduction

This section reports on the survey findings in relation to professional development, as defined by the incidence of coach-specific training, certifications/credentials and membership of coaching associations.

The following topics are addressed:

- Client expectations in relation to their coaches' being certified/credentialed.
- Receipt of accredited/approved coach-specific training.
- Membership of professional associations and certifications/credentials.

Training and Accreditation

Client expectations

A large majority of coaches (76%) 'agreed' - either somewhat (41%) or strongly (35%) - with the statement that people and organizations who receive coaching expect their coaches to be certified or credentialed. One in 10 did not agree with this statement and the remaining 14% of respondents remained undecided.

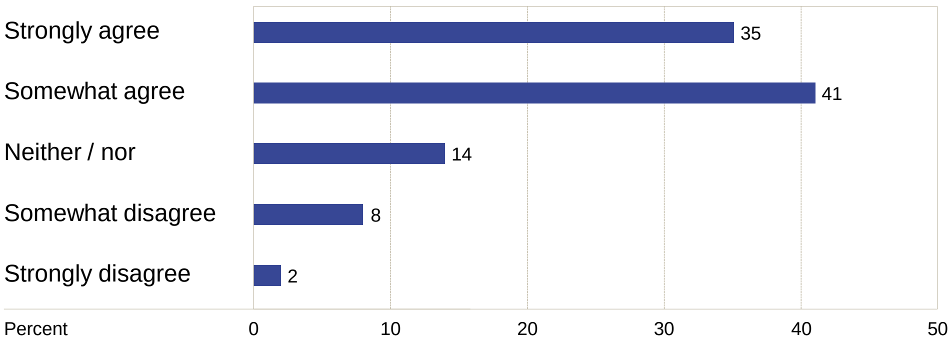
To provide a historical context, the findings from the *2012 ICF Global Coaching Study* echo the messages emerging from previous studies. In the *2007 ICF Global Coaching Study*, 52% of coaches agreed that "the people we coach increasingly expect us to be credentialed".

In the *2010 ICF Global Consumer Awareness Study*, 84% of adult consumers who had experienced a coaching relationship reported that it was important for coaches to hold a credential.

The majority view on client expectations was widely spread across different types of coaches and regions. Within that overall context, there were some variations in coaches' perceptions of client expectations.

Female coaches were more likely (77%) than their male counterparts (72%) to perceive that clients expect their coaches to be certified/ credentialed.

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



As can be seen from the charts overleaf, coaches living in the emerging regions were more likely to say that clients expected their coaches to be certified/credentialed.

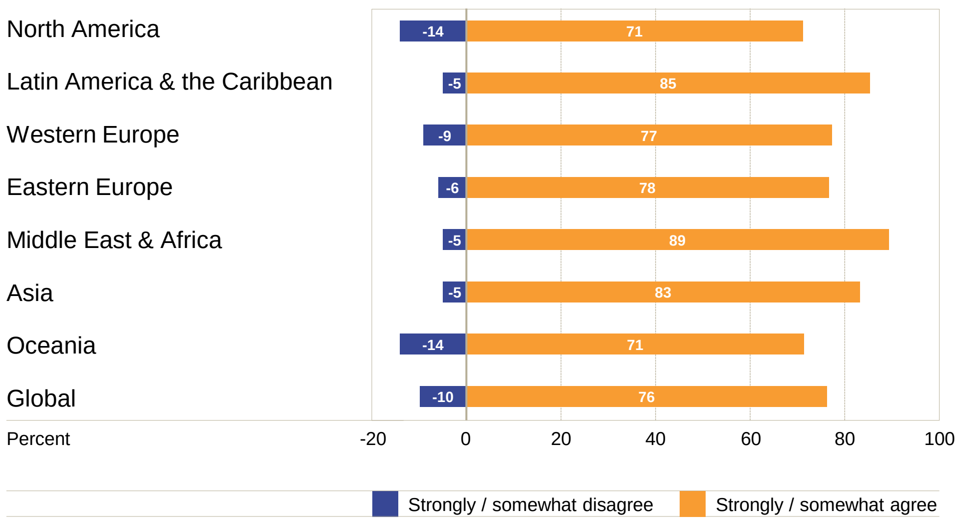
Perceptions of client expectations also varied with years of coaching experience, ranging from 83% agreement among those with less than 1 year experience to 66% among coaches with 10+ years experience.

This may reflect that more established coaches have already built up a clientele over their years coaching.

Client expectations

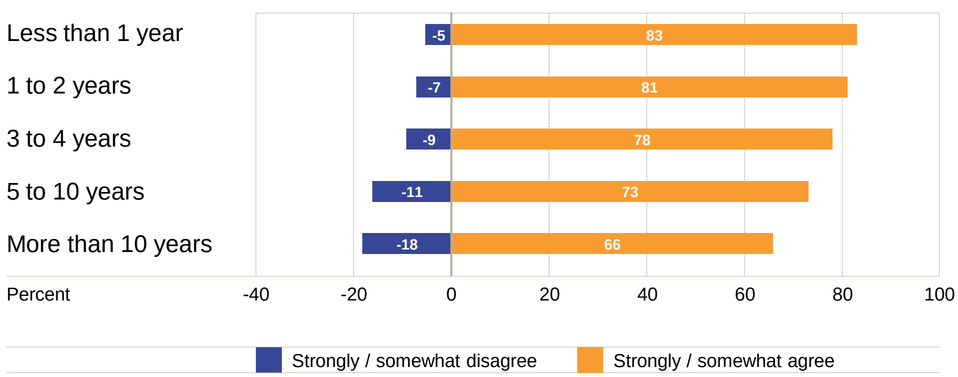
At the regional level, coaches in the emerging markets are most likely to agree that clients expect their coaches to be certified/credentialed.

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



When analyzed by number of years coaching, the less experienced coaches are most likely to agree that clients expect their coaches to be certified/credentialed.

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



Training and Accreditation

Receipt of coach-specific training

Almost all respondents (98%) said they had received some coach-specific training. Meaning that only 2% of coaches said they had not received any coach-specific training. This level was down from 5% when data was collected in the 2006 survey.

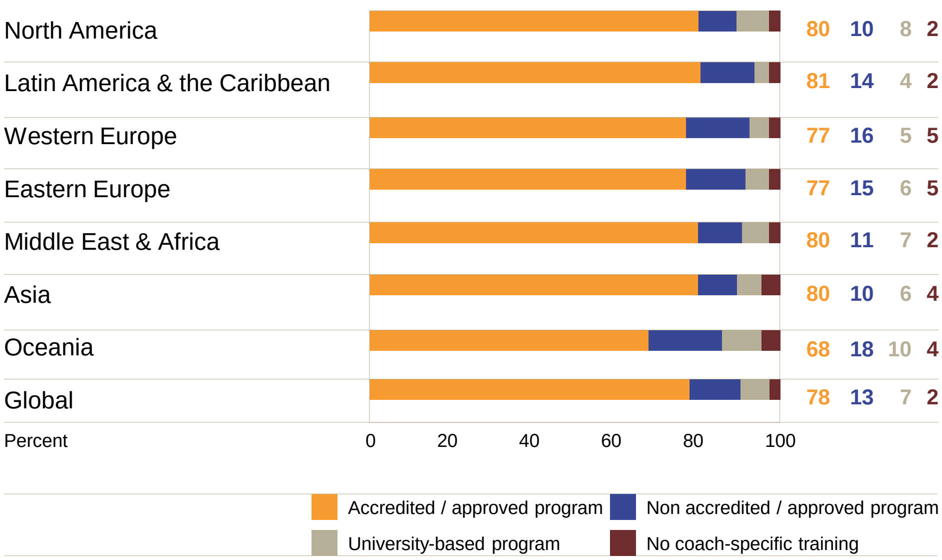
Mostly, respondents said they received their training through a program that was accredited/approved by a professional coaching organization (78%). The proportion varied across a number of dimensions, including:

- Gender – females (80%) versus males (75%).
- Years coaching – 71% of those with 10+ years experience compared to 80% of other coaches.
- Coaches with currently active clients – 79% compared to 73% of those without.
- Membership of coaching associations – 80% of those with any current membership, and 83% of current ICF members, compared to 59% with no membership.

There are also regional variations in the methods through which coaches access coach-specific training.

Four in five coaches in Latin America and the Caribbean (81%) received accredited/approved coach-specific training from a coaching association, compared with 68% in Oceania.

Received coach-specific training



13% of respondents said they had received non-accredited coach-specific training through a professional coaching association.

The proportion ranged from 10% in North America and Asia to 18% in Oceania. Almost one in five coaches (18%) with 10+ years of experience mentioned this source of training, compared with 11% of other coaches.

Finally, 7% of coaches cited a university-based program for their coach-specific training, ranging from 4% in Latin America and the Caribbean to 10% in Oceania.

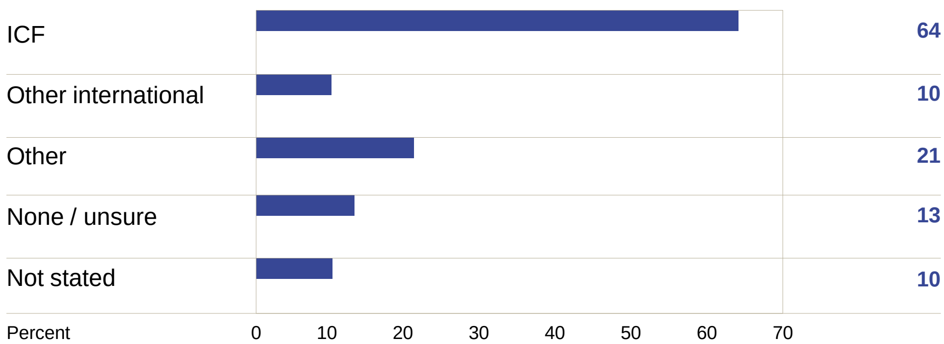
Training and Accreditation

Membership affiliation

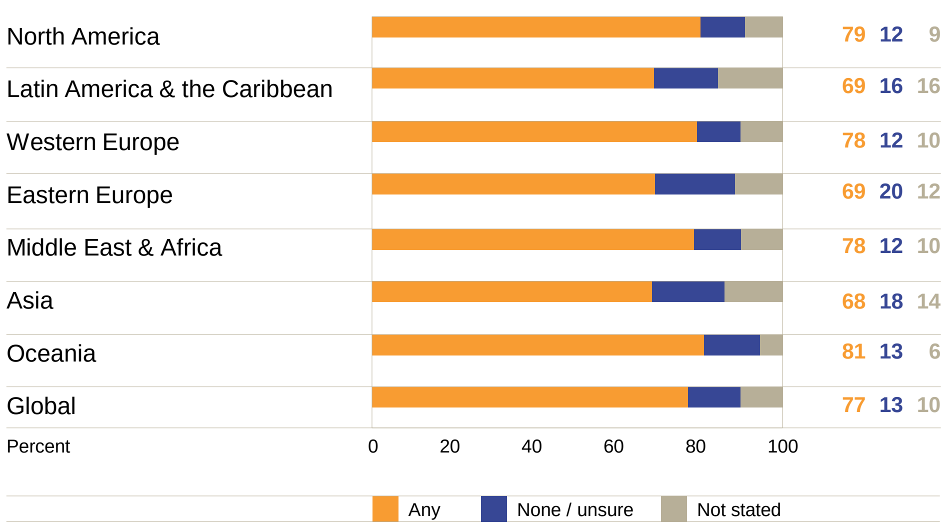
Survey respondents were asked whether or not they belonged to a specified list of professional associations. Nearly two-thirds (64%) of respondents identified themselves as ICF members. An additional 10% said they were members of other international coaching associations (these groups are listed in the Technical Appendix) and 21% specified some other regional or national association. As outlined in the methodology section, the ICF member database was the primary means of contacting potential respondents. The ICF share of respondents partly reflects that element of the survey methodology.

Respondents could select more than one membership of coaching associations (consequently, the proportions shown in the chart above add to more than 100%). After adjusting for membership overlaps, more than three in four respondents (77%) said they held at least one membership, ranging from a low of 68% in Asia to a high of 81% in Oceania. These regions were followed closely by North America (79%), Western Europe and the Middle East and Africa (both 78%). One in eight respondents (13%) said they were not members of any association (12%) or they were unsure (1%). The proportion was highest in the emerging regions of Eastern Europe (20%), Asia (18%) and Latin America and the Caribbean (16%).

Membership affiliations



Membership affiliations by region

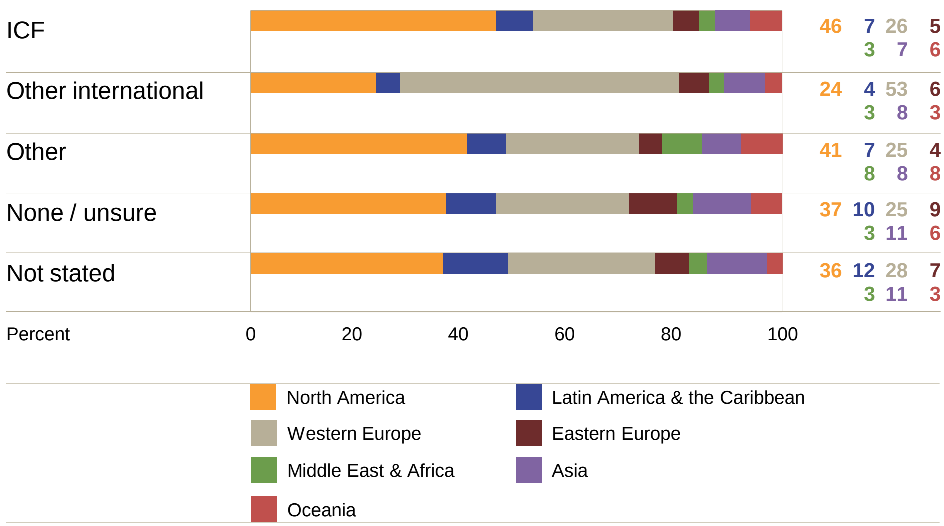


Membership affiliation

Membership affiliations vary by region. Almost one in two survey respondents (46%) identifying themselves as ICF members were located in North America.

A majority of respondents saying they are members of other international associations were located in Europe (53%). Memberships of regional and local associations are more widely dispersed across the world regions

Membership affiliations by region



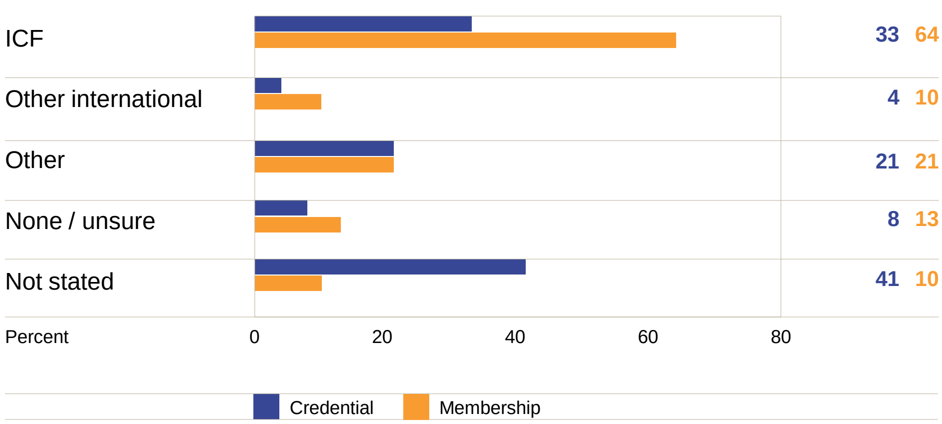
Certifications/Credentials

When asked if they currently hold any certifications/credentials from professional organizations, one in three respondents (33%) said they hold an ICF Credential.
By comparison, when they were asked the same question back in the 2006 survey, nearly one in five respondents (19%) said they currently hold an ICF Credential.

Only 4% of respondents said they hold a credential from another international association, while more than one in five (21%) mentioned a credential held from some other national or regional association.

Again, it should be borne in mind that the sample proportions for certifications/credentials will partly reflect the role of the ICF member database in conducting the survey.

Memberships and certifications/credentials

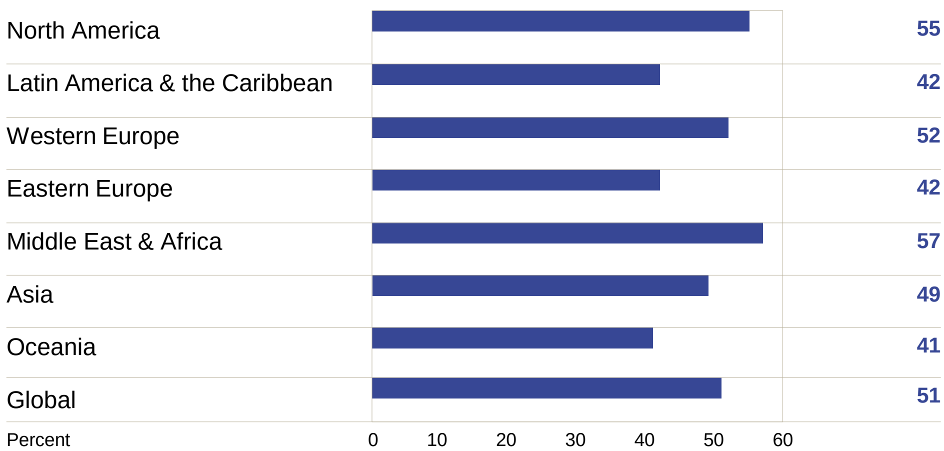


Training and Accreditation

Certifications/Credentials

On the 2011 survey, respondents could specify holding credentials from more than one professional organization. After allowing for multiple credentials, 51% of respondents indicated that they held at least one credential from a professional coaching association. The proportion was highest in the Middle East and Africa (57%), followed by North America (55%) and Western Europe (52%). The proportion with any credential was lowest in Oceania (41%), Latin America and the Caribbean (42%) and Eastern Europe (42%).

Any credential mentioned, by region



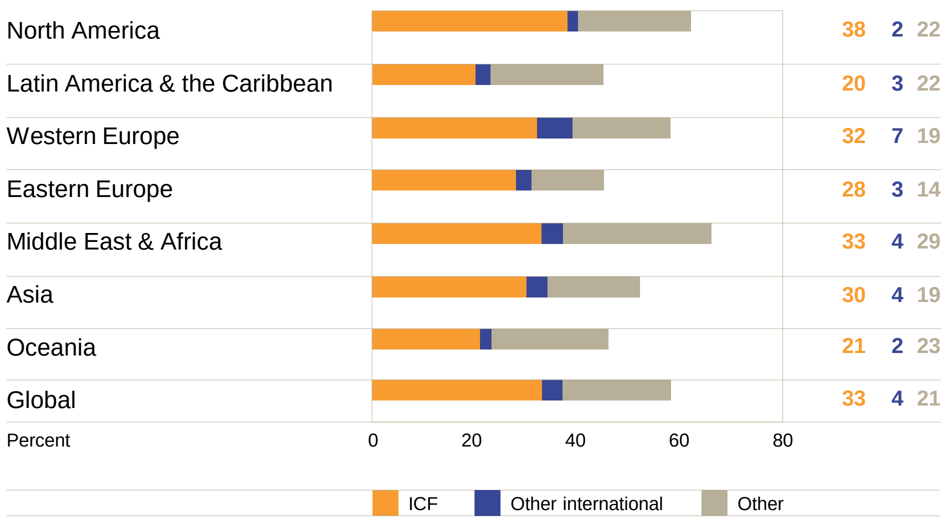
Training and Accreditation

Certifications/Credentials

As in 2006, North America contains the highest proportion of ICF-credentialed coaches (38% in 2011, versus 22% in 2006), followed by the Middle East and Africa (33%) and Western Europe (32%).

Note: The proportions shown in the chart across are not adjusted for multiple credentials.

Credentials by association and region



Certifications/Credentials

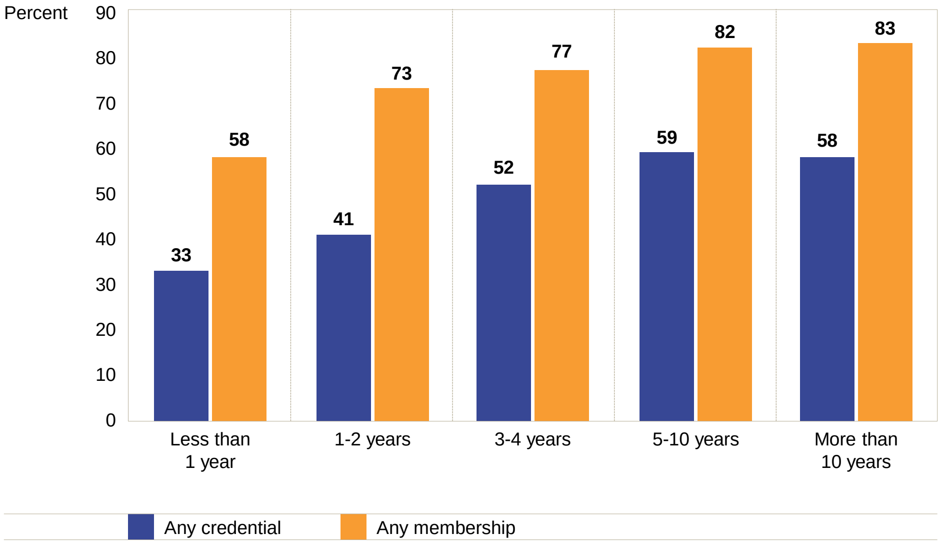
The likelihood of possessing one or more certifications and credentials varies with the characteristics of the coach. The variation by region has been mentioned previously.

Not surprisingly, membership of a coaching association is also an important predictor. Over half (54%) of coaches with any membership also said they hold one or more credentials from a professional organization. This compares with 12% of those who do not belong to any association.

Perhaps reflecting a lapsed membership, almost three quarters (74%) of those who did not indicate any membership affiliations indicated that they hold one or more credentials.

The likelihood of being credentialed also varies with the number of years of coaching experience, from one in three (33%) respondents with less than one year experience to almost six in 10 (58%) of coaches with 5+ years of experience.

Memberships and credentials, by years coaching

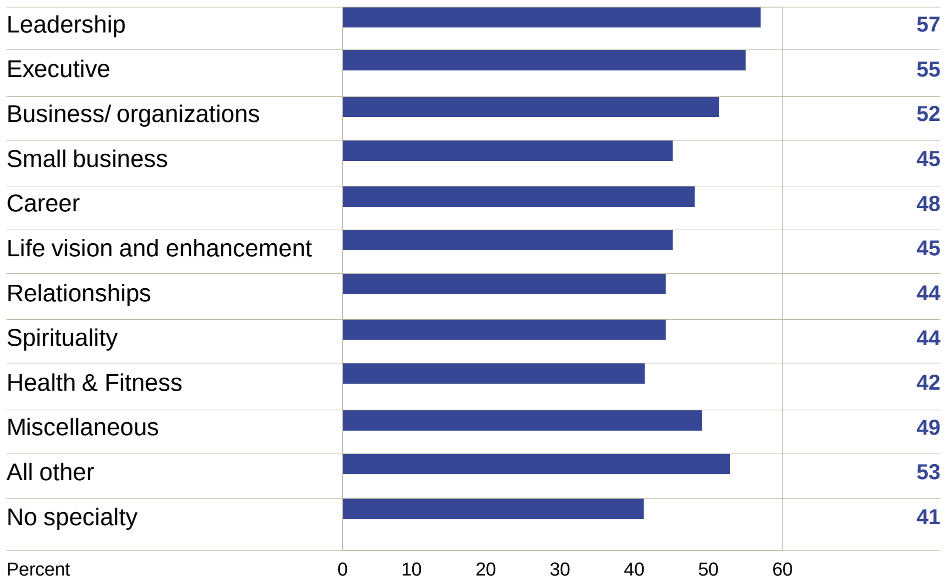


Training and Accreditation

Certifications/Credentials

In terms of gender, female coaches are more likely (52%) than are male coaches (48%) to hold a credential. Respondents with a business-focused specialty were also more likely to hold a credential; 54% compared to 47% of coaches with some other specialty.

Any credential by main area of coaching



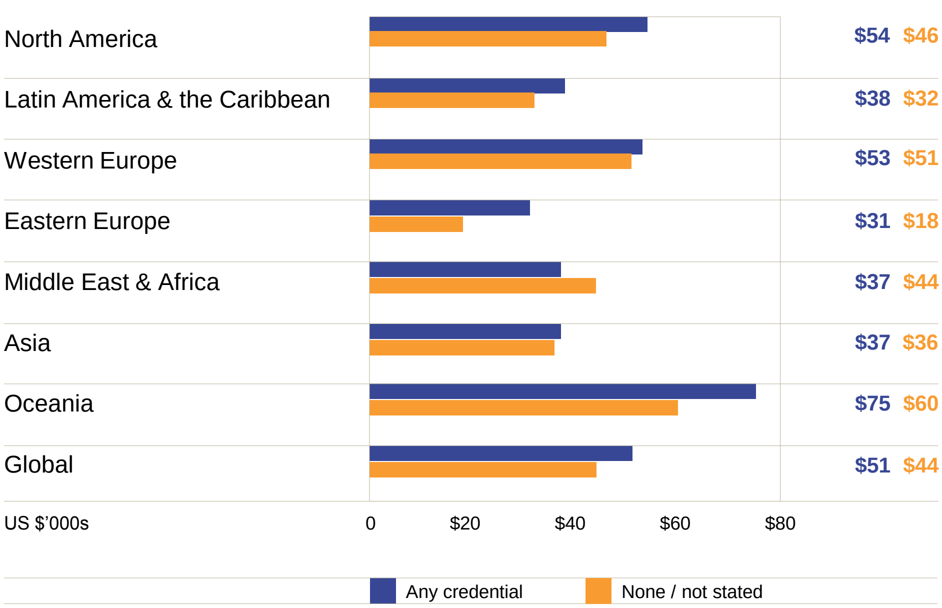
Summary business indicators

Respondents who were members of one or more professional associations also reported higher average revenue/income from coaching, by a margin of 25%. Similarly, those saying they hold one or more credentials from a professional association also reported above-average annual revenue/income from coaching.

Membership affiliation and possession of credentials was also associated with above-average fees per one hour coaching session.

Credentialed coaches reported higher average revenue across all the world regions, with the exception of the Middle East and Africa.

Average revenue / income from coaching ($000's)



As noted in Section 3, average revenues are strongly linked to years of coaching experience and having a business-focused specialty. The proportion of credentialed coaches also varies along both of those dimensions, being higher for the more experienced coaches and those with a business specialty.

It is, therefore, not at all surprising to find that, on average, credentialed coaches report a higher annual revenue/income from coaching compared to non-credentialed coaches.

Summary business indicators: Membership

	Annual Revenue US$	Reported 1 hour fee US$	Clients	Hours
Membership				
Any membership	49,700	240	10	13
None/not stated	40,000	200	10	13
Credentials				
Any credentials	50,700	240	11	14
None/not stated	44,500	220	9	12

Training and Accreditation

Key points summary

The key points to be noted from the survey findings in relation to training and accreditation are as follows:

- A large majority of coaches perceive that their clients expect coaches to be certified or credentialed. It appears that coaches are acting accordingly by completing coach-specific training.
- Nearly all survey respondents (98%) indicated that they had received some coach-specific training.
- The routes through which coaches have accessed coach-specific training vary by gender and number of years coaching. There are also regional differences.
- More than half (51%) of all respondents said they held at least one credential from a professional coaching association.
- The likelihood of possessing one or more certifications and credentials is above average among members of professional associations, female coaches, those with 5+ years of experience and coaches with a business-focused specialty.
- There are also regional contrasts in the prevalence of credentialed coaches. The proportion with any credential was lowest in Oceania (41%), Latin America and the Caribbean (42%) and Eastern Europe (42%).
- The proportion with any credential was highest in the Middle East and Africa (57%), followed by North America (55%) and Western Europe (52%).
- With the greater prevalence of more experienced coaches and those with a business-focused specialty, credentialed coaches reported higher fees per one hour coaching session and higher annual revenue/income from coaching compared to non-credentialed coaches.

Section 5

The Client

The Client

Introduction

The client is the central focus of this section, under the following headings:

- Client gender proportions.
- Client age composition.
- Position held by majority of clients.
- Primary/sponsored clients.
- Main areas addressed in coaching engagements.
- Average length of a coaching engagement.
- Key business indicators.

Client gender proportions

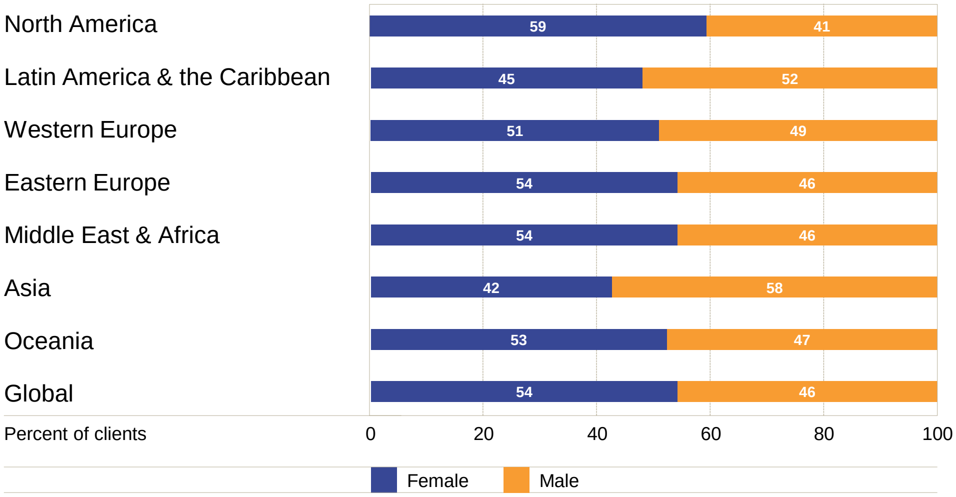
When studied in 2006, females accounted for the majority of coaching clients. At 54%, the 2011 female share is slightly reduced, from 57% in 2006.

The female share is highest in North America (59%). By contrast, the majority of clients are male in both Asia (58%) and Latin America and the Caribbean (52%). As both of these are emerging regions, their majority male client shares may be part of the reason for the slight reduction in the female share at the global level.

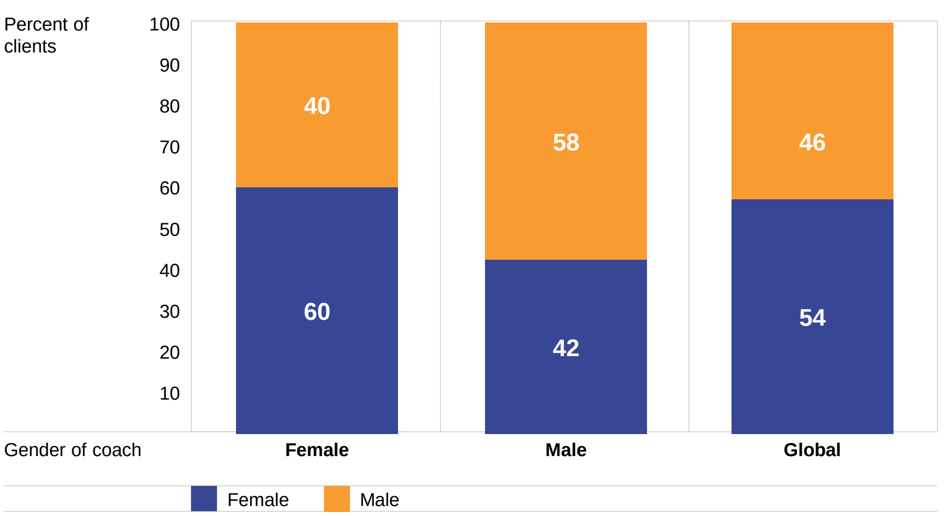
The regional pattern in the split between female and male clients is correlated with the regional gender distribution of coaches. The female share of clients is highest in North America (59%), which also contains the highest share of female coaches, and lowest in Asia (42%) and Latin America and the Caribbean (48%) where the female share of coaches are also lower.

When studied in 2006, client gender was related to the gender of the coach. In other words, male coaches had a majority of male clients and the majority of female coaches had female clients. As shown in the accompanying chart, the same pattern was also observed in 2011.

Clients: Female/male proportion



Female/male client proportions by gender of coach

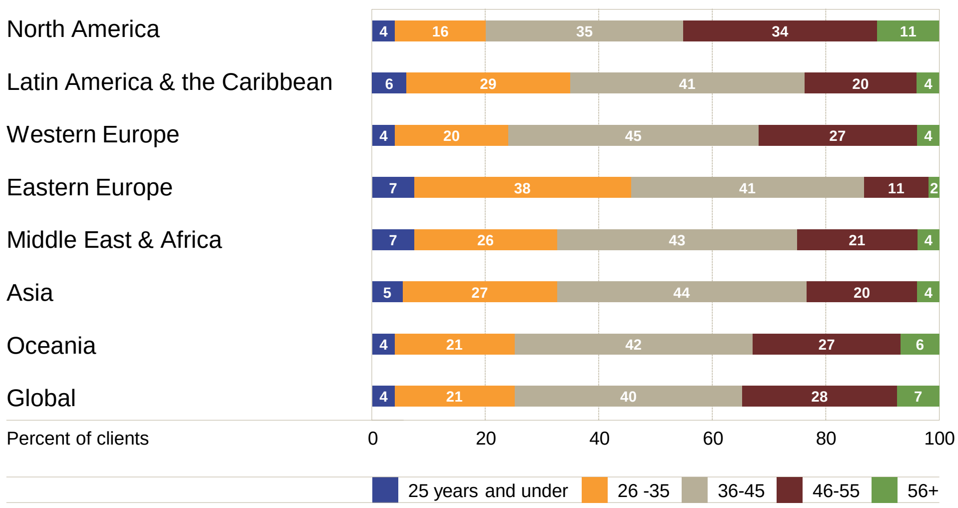


Client age composition

Globally, 65% of coaching clients are aged under 46 with the remaining 35% in the 46 and over age bracket. The age profile of clients in 2011 was therefore very similar to 2006, when 67% of clients were aged under 46.

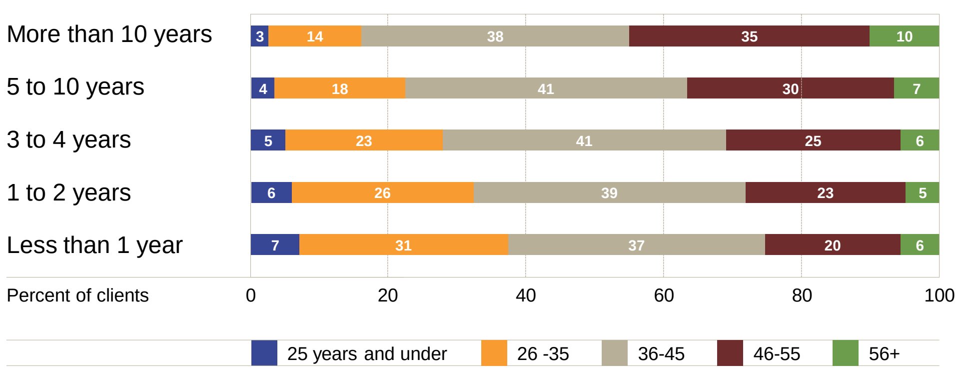
Within that broad context, the age profile of clients varies sharply from one region to another. The proportion of clients under age 46 ranges from 87% in Eastern Europe to 55% in North America. In general, the age profile of clients tends to be younger in the emerging regions.

Age of client



The age profile of clients also varies strongly dependent upon the coach's number of years experience. As can be seen from the accompanying chart, the fewer the number of years of coaching experience, the 'younger' the client age profile. Among coaches with less than one years experience, 74% of clients are aged under 46 years. This compares with 63% among coaches with 5-10 years experience and 55% among those with 10+ years experience.

Age of client by years coaching



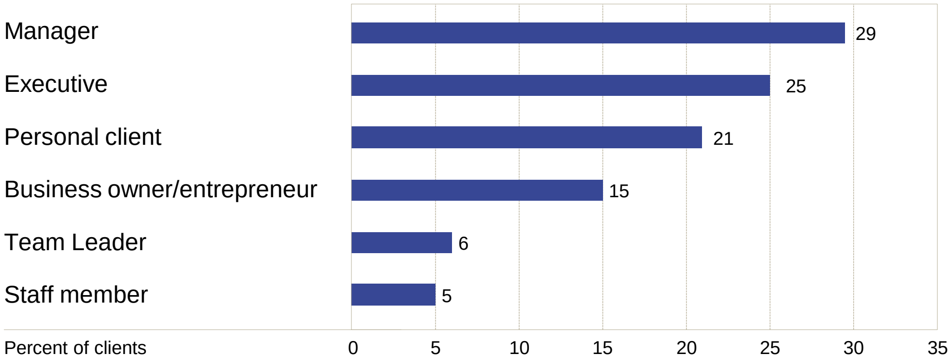
The Client

Position held by clients

When asked to indicate the position held by the majority of their coaching clients, 29% said they mainly coach managers. One in four respondents replied that the majority of their clients are in executive positions. Little more than one in five coaches (21%) rely on personal clients. The remaining coaches mainly serve business owners/entrepreneurs (15%), team leaders (6%) and staff members (4%).

In very broad terms, the foregoing client profile was replicated across the major world regions, albeit with some variations in the pattern of demand.

Position held by majority of clients



For example, in North America, the prevalence of personal clients (25%) was slightly above the global average (21%) and business owners/ entrepreneurs (19%) were slightly over-represented compared to the global average across all regions (15%).

By contrast, in Western Europe, more than one in three coaches (35%) said their clients held a managerial position. Comparatively fewer coaches identified personal clients (16%) as their main source of business, compared to the global average of 21%.

There may also be some variations in how client positions are perceived. For example, in Latin America and the Caribbean, almost one in four coaches (23%) identified team leaders as their main source of clients; well in excess of the global average of 6%.

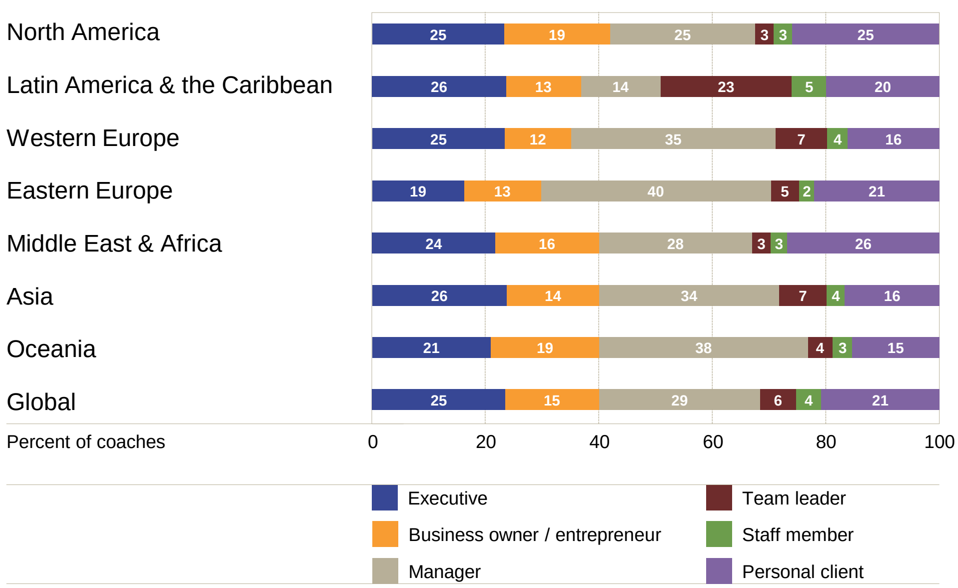
However, clients in managerial positions were cited by only 14% of coaches, compared to 29% globally. Interestingly, the combined totals for managers and team leaders in Latin America and the Caribbean (37%) is only slightly above the global average (35%) for those same client positions.

The Client

Position held by clients

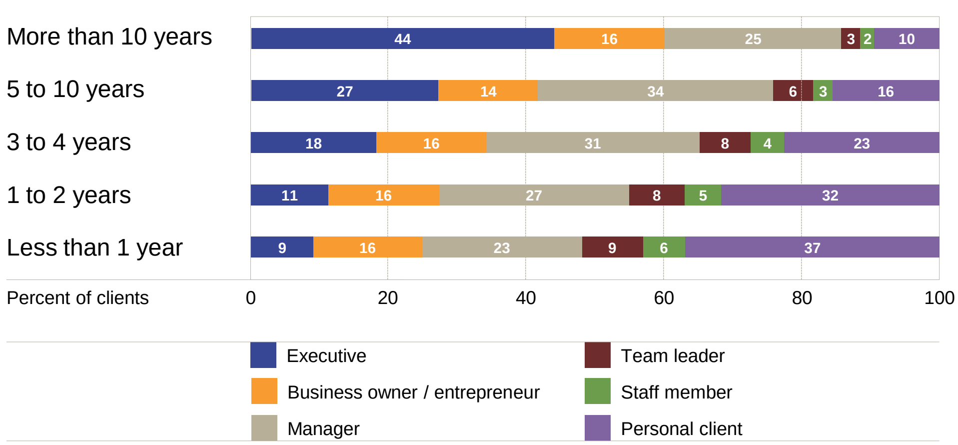
The profile of clients by position held is broadly similar across the world regions. The exception is Latin America and the Caribbean; where 23% said the majority of their clients are team leaders compared to 6% globally.

Position held by majority of clients



The profile of clients by position held varies strongly with years of coaching experience. The more experienced coaches mainly deal with executives and managers. The less experienced coaches are more likely to rely on personal clients in their professional practice.

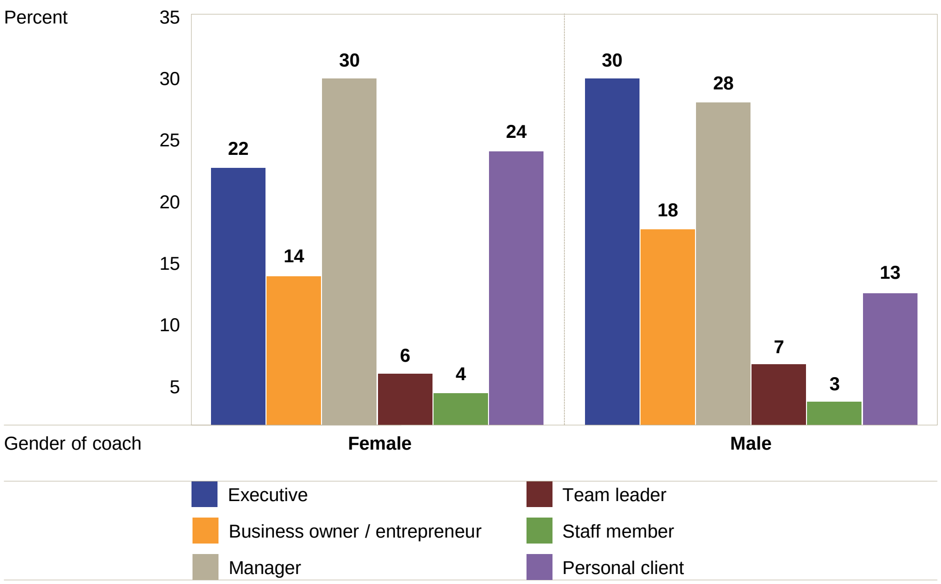
Position held by majority of clients



Position held by client

Female coaches were less likely to say that the majority of their clients occupy an executive position; 22% of female coaches compared to 30% of male coaches. Female coaches were more reliant on personal clients; 24% compared to 13%.

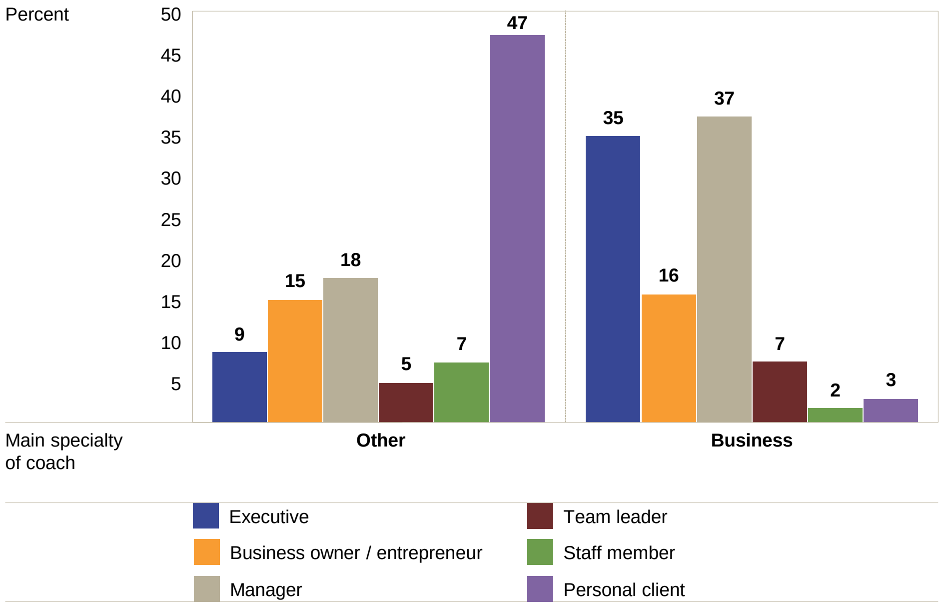
Position held by majority of clients by gender of coach



Position held by client

Coaches with a business-focused specialty mainly serve clients in executive (35%) or managerial positions (37%). Personal clients account for almost one in two clients (47%) among coaches with some other specialty.

Position held by majority of clients by main specialty



The Client

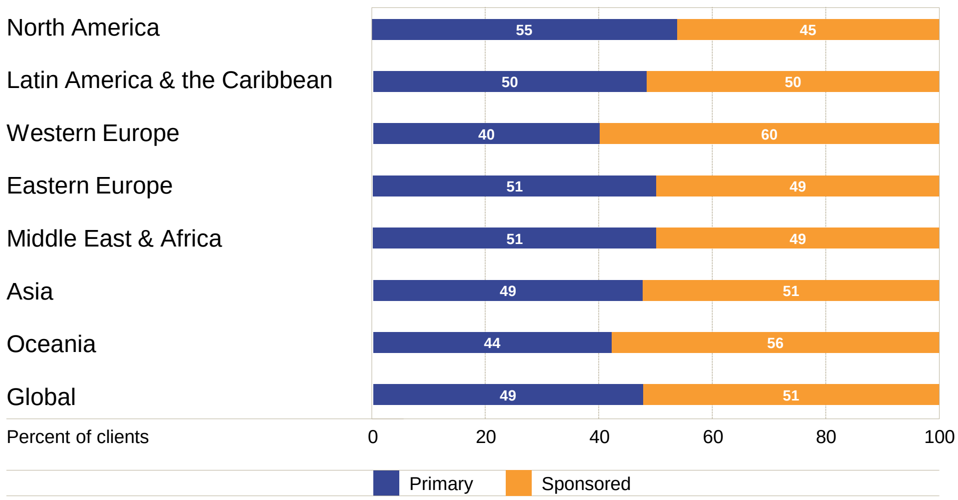
Primary/sponsored clients

On average, clients are almost equally split between those who pay for their own coaching (primary clients) and those for whom coaching is paid for by a third party (sponsored clients).

Sponsored clients are more frequent in Western Europe (60%) and Oceania (56%). Primary clients are in the majority in North America (55%).

The position held by the majority of the coach's clients is an important predictor of the split between primary and sponsored clients.

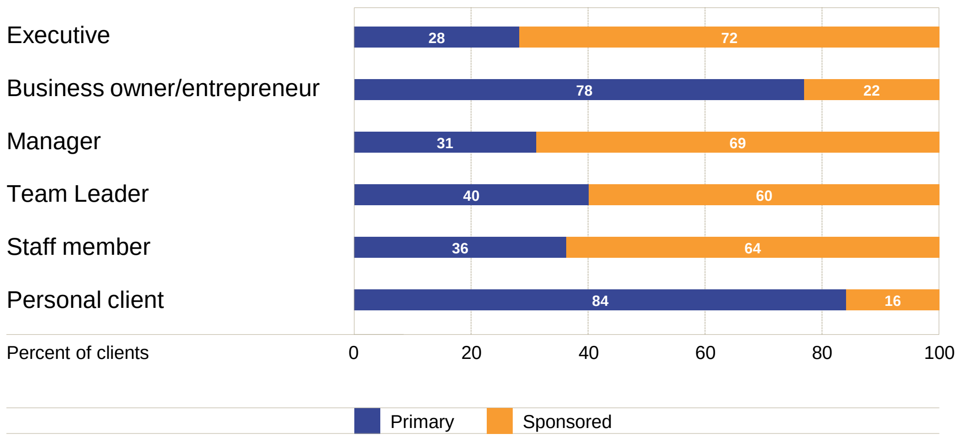
Primary and sponsored clients



The sponsored share is significantly higher where the majority of clients occupy positions within an organization; ranging from 60% for coaches mainly dealing with team leaders to 72% for coaches who mainly work with executives.

By contrast, clients paying for their own coaching predominate among coaches who mainly deal with business owners/entrepreneurs or personal clients.

Primary and sponsored clients by position held by client



The Client

Primary/sponsored clients

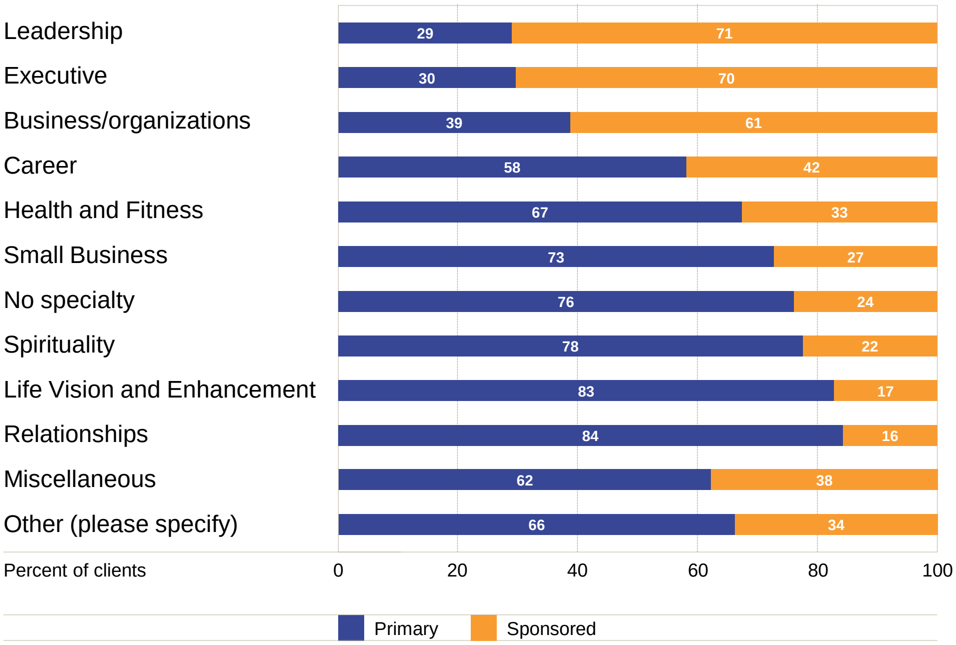
Reflecting the same linkage with the client's position, the sponsored share also varies with the coaching specialty. In general, the sponsored share is significantly higher among coaches with a business-focused specialty (65%) compared to those with some other main specialty (35%).

Examining the main coaching specialty in more detail, it can be seen that the sponsored share is especially high among coaches specializing in leadership (71%), executive (70%) and business/ organization coaching (61%).

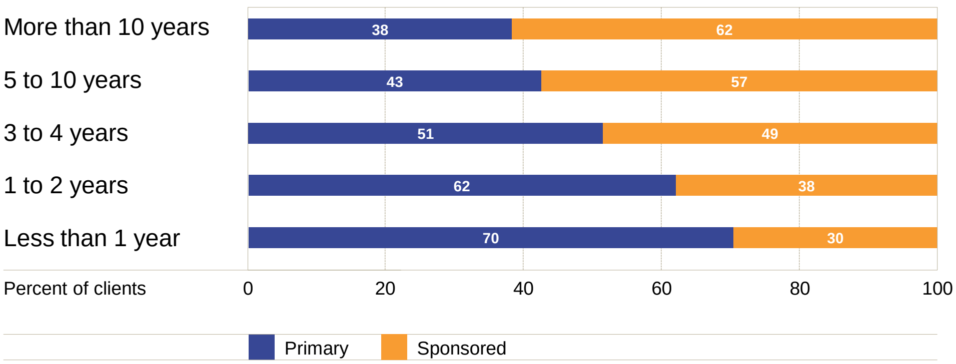
As noted previously in this section, the demographic attributes of the coach vary with the position held by the client. In particular, among the most experienced coaches (10+ years of coaching), the majority of clients (62%) are sponsored. The sponsored share falls steadily as years of experience decline, to 30% among those with less than 1 year's experience.

Other characteristics linked to a high share of sponsored clients include gender (54% for male coaches compared to 49% for females) and whether the coach is internal (70% sponsored) or external (49% sponsored).

Primary and sponsored by main specialty of coach



Primary and sponsored clients by years coaching



Main areas addressed in coaching engagements

The main areas addressed by coaches encompass personal growth (38%), interpersonal relationships (32%), self-esteem (28%), communication skills (26%), staff/team effectiveness (26%) and work-life balance (25%). The less frequently mentioned areas were financial management (2%) and meeting educational objectives (2%).

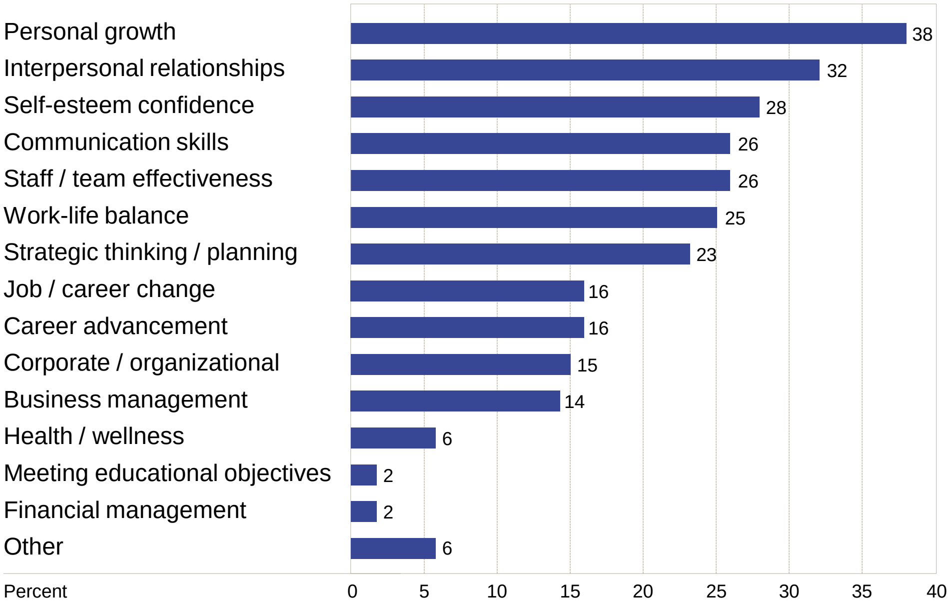
Some regional variations are apparent in the main areas for seeking coaching. In Latin America and the Caribbean, the most frequent reason for seeking coaching was inter-personal relationships (41%). Coaches in Oceania most often cited staff/team effectiveness (33%).

However, in each of the other world regions, personal growth was mentioned most often as the main area addressed by coaching. There was, therefore, some degree of consistency in the regional pattern of responses.

The position held by the client is a more important influence on the main area of concern.

As can be seen from the table overleaf, the reasons for which personal clients seek coaching differ from the remaining client positions.

Main areas addressed in coaching



For example, personal growth was a main area addressed for 64% of personal clients compared to fewer than one in four executives.

The latter client type was concerned mainly with interpersonal relationships (40%) and staff/team effectiveness (37%).

Main areas addressed and position held by clients

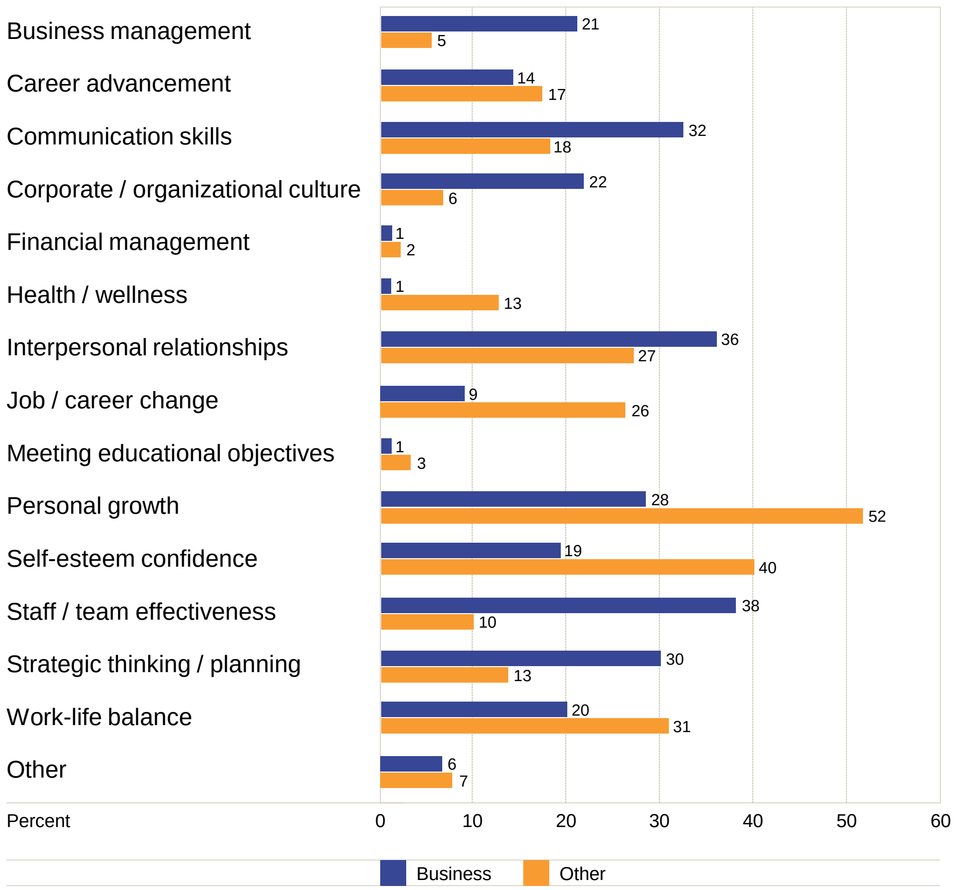
	Executive	Business owner / entrepreneur	Manager	Team leader	Staff member	Personal client	Global
	Percent of coaches						
Personal growth	24	35	30	33	38	64	38
Interpersonal relationships	40	19	37	36	25	31	32
Self-esteem confidence	15	24	24	26	31	46	28
Staff/team effectiveness	37	20	37	41	21	4	26
Communication skills	31	22	34	36	23	14	26
Work-life balance	18	30	21	21	29	32	25
Strategic thinking/planning	35	40	20	19	12	10	23
Career advancement	14	8	22	15	27	13	16
Job/career change	10	12	17	15	28	26	16
Corporate/organizational culture	29	11	18	15	9	2	15
Business management	17	33	15	9	7	2	14
Other	8	8	5	2	5	8	6
Health/wellness	1	5	2	4	11	16	6
Financial management	1	4	0	1	2	2	2
Meeting educational objectives	1	0	1	3	5	4	2

Main areas addressed in coaching engagements

The main areas addressed by coaches vary sharply by main coaching specialty. Business-focused coaches most often address topics around staff/team effectiveness (38%), interpersonal relationships (36%) and communication skills (32%).

Other types of coaches mainly address personal growth (52%), self-esteem confidence (40%) and work-life balance (31%).

Main areas of concern by coaching specialty

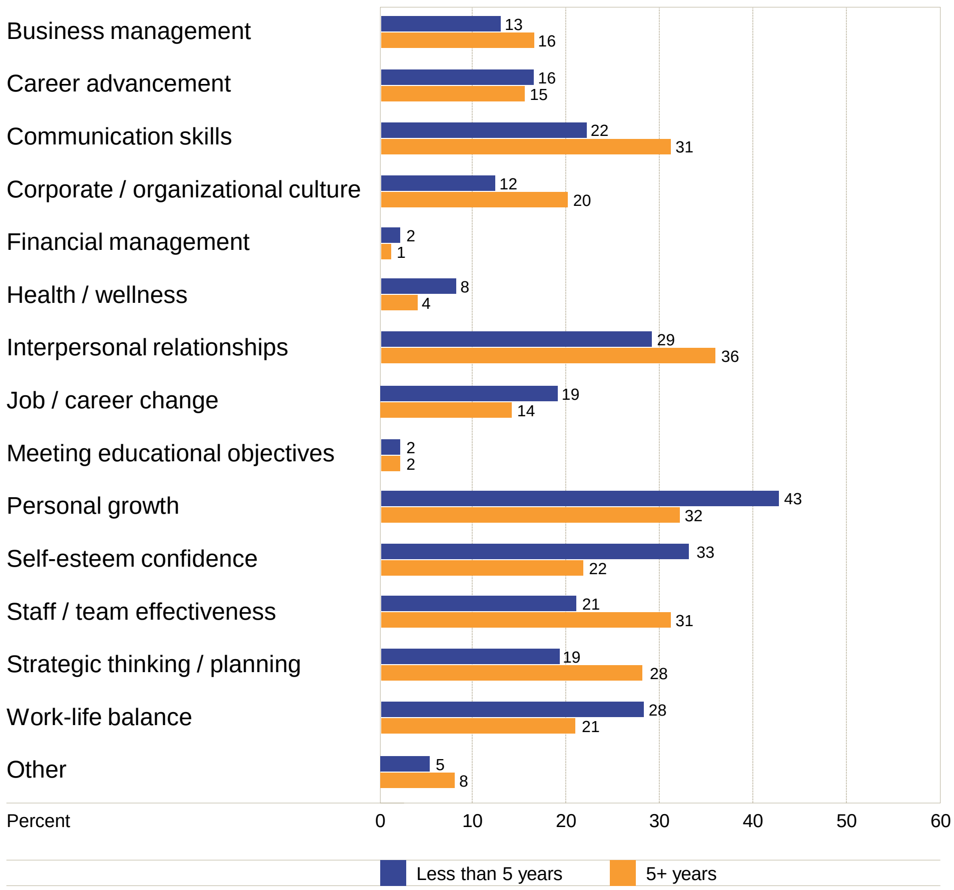


The Client

Main areas addressed in coaching engagements

Reflecting their greater likelihood of specializing in a business-focused coaching area, coaches with 5+ years of experience are more likely to deal with business-related concerns such as staff-team effectiveness (31%), interpersonal relationships (36%) and communication skills (31%).

Main areas of concern by years coaching



Average length of coaching engagement

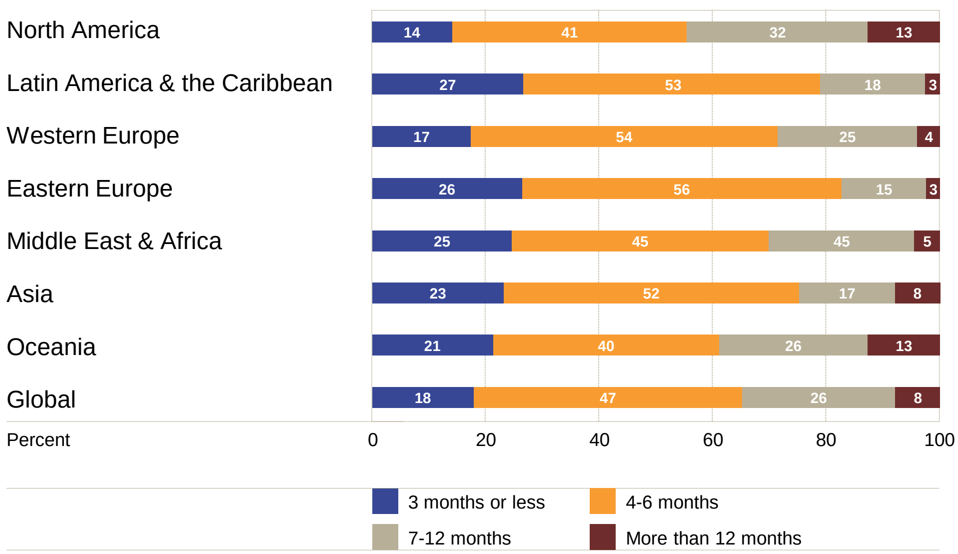
Almost half of all coaching engagements (47%) last between 4-6 months, followed by those lasting 7-12 months (26%). Comparatively few assignments (8%) last more than 12 months.

The length of a typical engagement varies somewhat across the world regions. Shorter assignments (lasting less than 3 months), are relatively infrequent in North America (14%). In both North America and Oceania, longer-term engagements (12 months duration or more), occur more frequently than in other regions (13%).

By contrast, in both Latin America and the Caribbean and Eastern Europe, at least 80% of engagements last less than 6 months; compared to the global average of 65%.

The duration of a typical engagement also varies with the main coaching specialty. Coaches with a business-focused specialty are more likely to work on assignments lasting 7 months or more (39%) compared to other coaching areas (29%). Durations also vary with the client's position and the years of coaching experience, as illustrated in the charts on the following page.

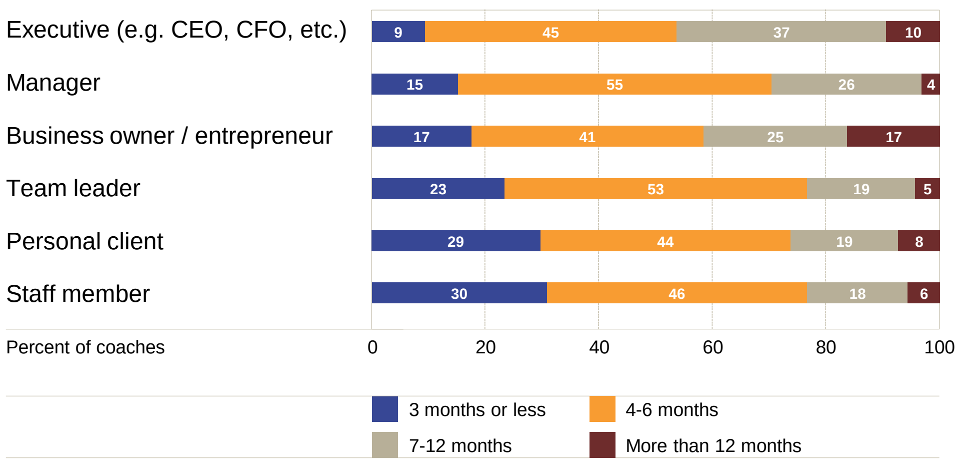
Average length of typical coaching engagement



Average length of a coaching engagement

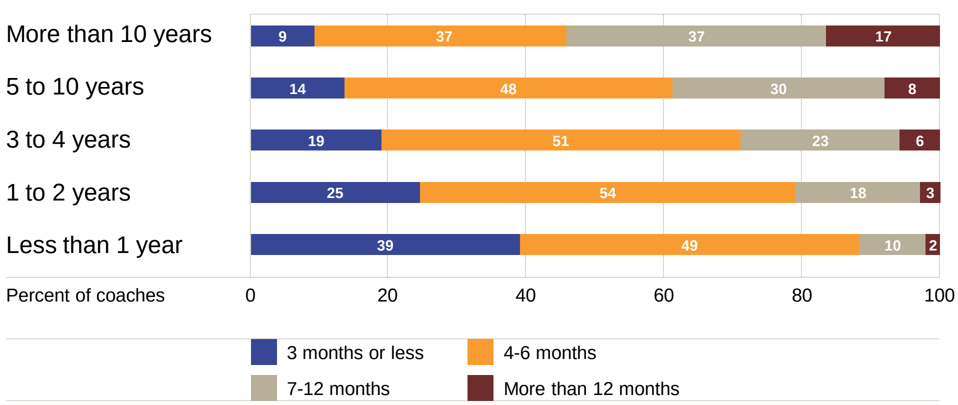
Coaching engagements lasting 7 months or more occur more frequently among coaches dealing mainly with executives (47%) and less frequently where the client is a staff member (24%) or team leader (24%).

Average length of a coaching engagement by client position



Experienced coaches are more likely to be retained on coaching engagements lasting 7 months or more. Over one in two coaches with 10+ years of experience (54%) said the average length of a typical engagement was more than 6 months, compared with one in five coaches (21%) with 1-2 years experience.

Average length of a coaching engagement by years coaching



Key business indicators

Annual revenue/income from coaching and the remaining key business indicators are strongly shaped by the characteristics of the client and the nature of the coach-client engagement.

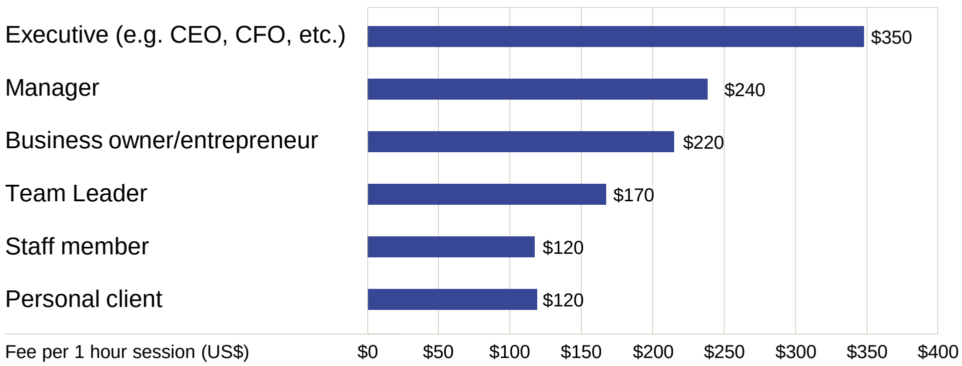
The position held by the majority of the coach's clients exerts an important influence on fees reported per 1 hour session. Among coaches for whom the majority of clients are executives, the average fee reported per 1 hour session was $350. This was three times higher than the average fee reported by coaches where the majority of clients are staff members ($120) or personal clients ($120).

Consequently, annual revenue/income from coaching is significantly higher for those who mainly coach executives ($83,500) when compared with the global average for all coaches ($47,900) (See page 93).

Hourly fees and annual revenues are also positively linked to the proportion of a coach's clients who are sponsored and the length of a typical engagement.

The higher the sponsored client share, the higher the hourly fee and annual revenue. A similar relationship is also observed with the length of the coaching engagement (see page 93).

Fee per 1 hour coaching session by client position



Each of the foregoing client attributes are linked to variations in the attributes of coaches themselves.

For example, executives are more likely to be coached by the more experienced coaches and those with a business-focused specialty.

These linkages, in turn, help to explain the higher fees and annual revenues earned by the more experienced coaches and those with a business-focused specialty, as outlined in section 3.

Key business indicators

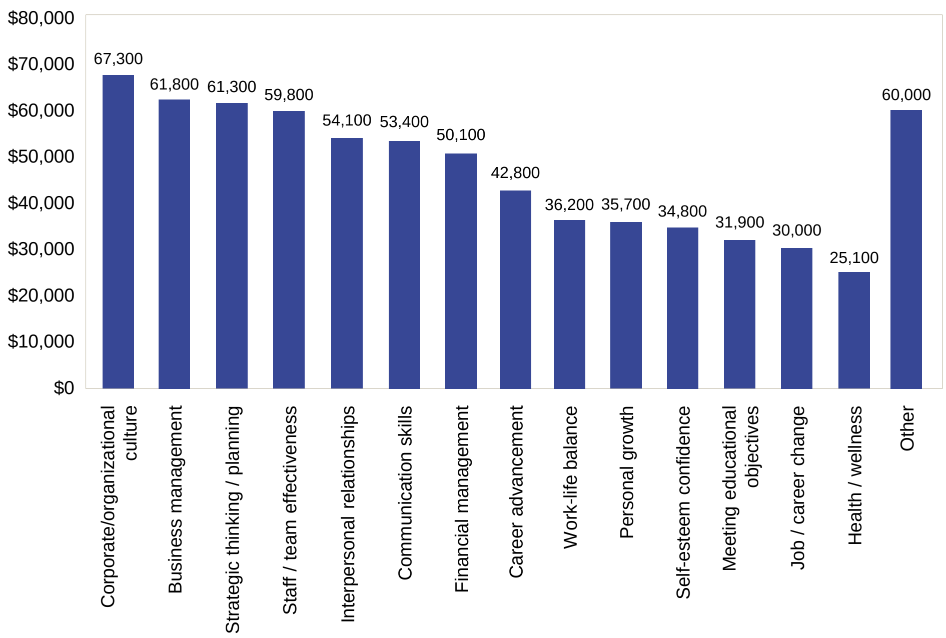
		Annual revenue	Reported 1 hour fee	Clients	Hours
		US$	*US$*		
Position	Executive (e.g. CEO, CFO etc)	83,500	350	12	16
	Business owner/entrepreneur	50,900	220	10	16
	Manager	40,400	240	10	12
	Team leader	31,800	170	10	11
	Staff member	26,500	120	12	12
	Personal client	18,800	120	8	11
Sponsored	No clients sponsored	26,300	160	7	11
	1%-50% sponsored	43,900	200	10	15
	51%-95% sponsored	62,900	270	14	16
	96%+ sponsored	64,100	310	11	12
Length of typical engagement	3 months or less	25,200	150	8	11
	4 to 6 months	39,300	220	9	12
	7 to 12 months	64,800	280	12	15
	More than 12 months	84,500	290	15	18

Key business indicators

Hourly fees and annual revenues also vary with the main areas addressed in coaching engagements. The highest hourly fees and annual revenues were reported by respondents who coach clients in corporate/ organizational culture, business management and strategic thinking/planning.

Each of those areas is more often addressed by coaches with a majority of their clients in executive positions and also more experienced coaches with a business-focused specialty.

Annual revenue by main areas addressed in coaching (US$)

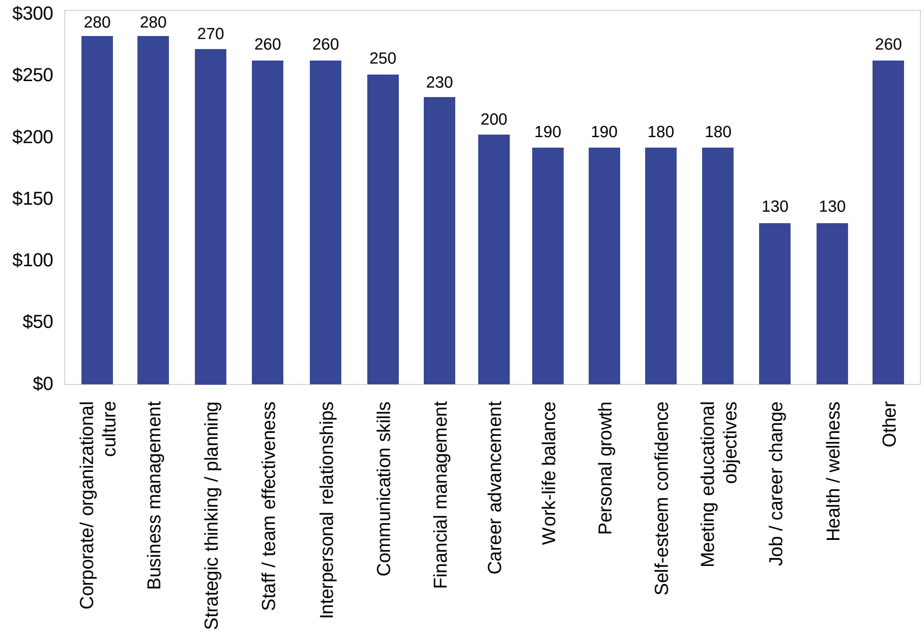


Key business indicators

For example, more than one in four coaches (29%) serving clients in executive positions said they addressed corporate/organizational culture, compared to just 2% of coaches with mainly personal clients.

Coaches with clients in executive positions are also more highly compensated and this factor is clearly reflected in the fee and revenue variations by main area of coaching addressed.

Hourly fee by main areas addressed in coaching (US$)



The Client

Key points summary

The key points to be noted from the survey findings in relation to the profile of coaching clients are as follows:

- The age and gender composition of coaching clients in 2011 was broadly similar to the position in 2006. The majority of clients are female (54%). Approximately one in three clients are aged 46 and over. The age profile of clients tends to be younger in the emerging regions of Asia and Latin America. These regions also tend to have lower female proportions of clients.
- The more experienced coaches, and those with a business-focused specialty, mainly deal with executives and managers. The less experienced coaches are more likely to rely on personal clients in their professional practice.
- On average, clients are almost equally split between those who pay for their own coaching (primary clients) and those whose coaching is paid for by a third party (sponsored clients). The sponsored share is significantly higher where the majority of clients occupy a position within an organization, such as executive or manager.
- The position held by the client also exerts an important influence on the main area addressed in coaching engagements. Thus, the identified coaching specialties seem to be congruent with the needs of the client.
- The duration of a typical coaching engagement varies both by region and by the position of the client. Longer engagements were more often reported by the experienced coaches and those with a business-focused specialty.
- Annual revenue/income from coaching and the remaining key business indicators are 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 1 hour session, with those coaches serving executives commanding the highest hourly fees and also earning the highest annual revenue/income from coaching.
- Revenues and fees are also positively related to the proportion of clients whose coaching is sponsored and the duration of the engagement.

Section 6

The Interaction Between Coach and Client

The Interaction Between Coach and Client

Introduction

This section examines the interaction between the coach and the client, under the following headings:

- Attributes that influence the hiring decision.
- Delivery methods used by coaches.
- Theoretical models from which coaches draw.
- Methods coaches use to evaluate the impact of their coaching.

The hiring decision

Respondents to the *2012 ICF Global Coaching Study* were presented with a list of attributes that may affect the client's decision to hire a coach. Respondents were asked to state the extent to which they believe each attribute is important to a coaching client. The attributes were grouped under the following headings:

- Coach's background (level of education, coaching credential or certification, etc).
- Coach's experience (number of years as a coach, etc).
- Coach's reputation (referrals and references).
- How the coaching is done (delivery method used, cost of coaching, etc).

The Interaction Between Coach and Client

Attributes important to a client: Coach's background

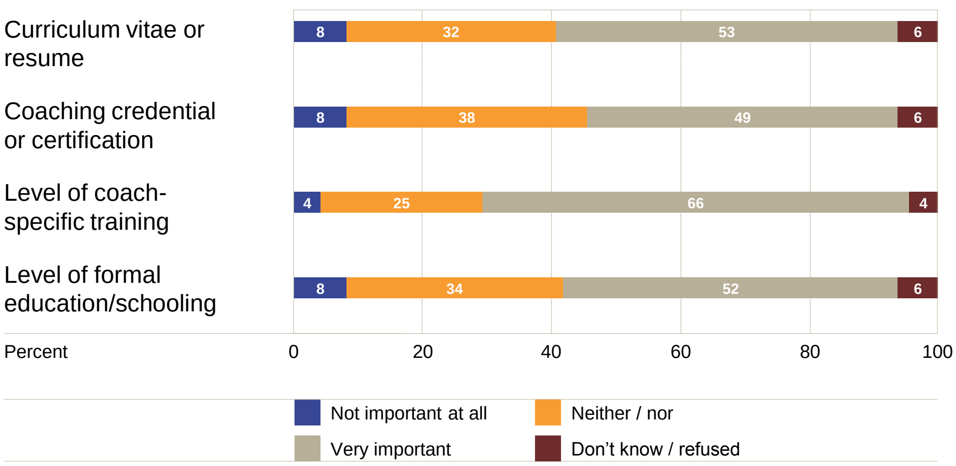
Two in three respondents (66%) said they believe the level of coach-specific training was very important to the client. Approximately half of respondents considered the coach's curriculum vitae or resume (53%), level of formal education/schooling (52%) and coaching credential or certification (49%) to be very important.

The responses varied significantly by region. Respondents from Latin America and the Caribbean and the Middle East and Africa were consistently above the global average in prioritizing the importance of these four attributes (see Table on page 104). For example, 83% of coaches in Latin America and the Caribbean considered the level of coach-specific training to be very important.

Coaches in Western Europe placed less weight on the level of formal education/schooling (42% very important) and assigned greater emphasis on the level of coach-specific training (70% very important).

By contrast, respondents from North America clearly identified that formal education/schooling is very important (57%) but were less likely to cite the importance of the other attributes of a coach's background.

Importance of coach's background



While the regional contrasts were most striking, the proportions also varied with the characteristics of the coach, albeit in a somewhat predictable fashion.

Not surprisingly, the higher the level of educational qualifications, the more likely was the respondent to feel that the level of formal education/schooling was very important (61% of those with third-level education compared with 21% of respondents with primary education).

Similarly, coaches with any coaching credential were more likely to say that a coaching credential or certification is very important to the client; 57% compared to 34% of those with no credential.

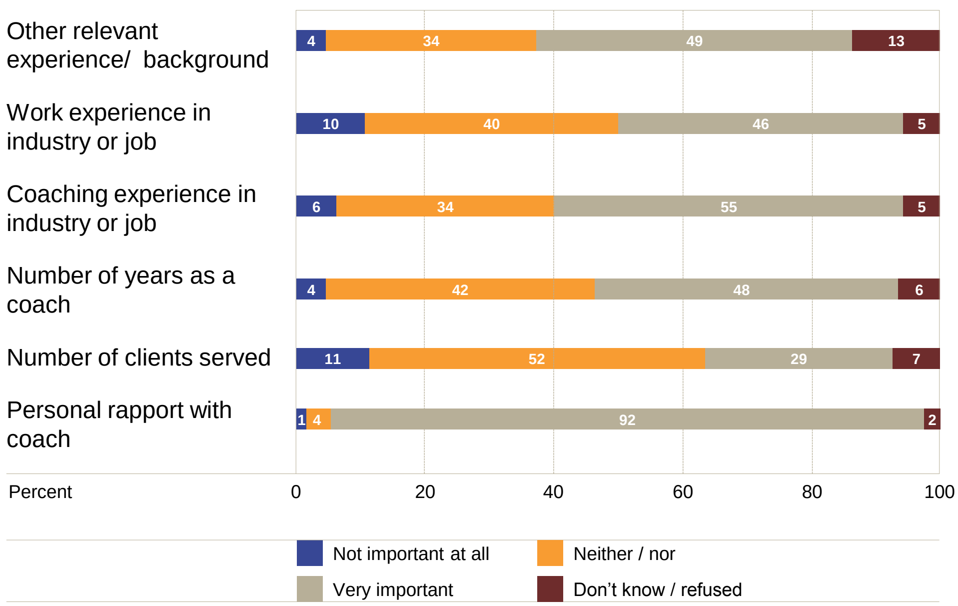
The Interaction Between Coach and Client

Attributes important to a client: Coach's experience

When asked about attributes relating to the coach's experience, 92% of respondents described the personal rapport between coach-client as very important. Coaches in North America (97%) and Oceania (98%) were almost unanimous, significantly above the remaining regions.

The responses to the other attributes of experience were less definitive. There were significant regional variations. Coaches in North America and Oceania tended to place a greater emphasis on coaching experience in their industry or job and also work experience in their industry or job. In those regions, respondents were less likely to say that the number of years as a coach or the number of clients served are very important to the coaching client.

Importance of coach's experience



The number of years as a coach was more strongly emphasized in Asia (54%), Latin America and the Caribbean (52%) and Western Europe (50%).

In Eastern Europe, respondents were above average in identifying that the number of clients served is very important (45%).

The responses also varied with the demographic characteristics of the coach, notably years of experience, main coaching specialty and whether the coach was internal or external.

Respondents specializing in life vision and enhancement coaching were less likely to consider coaching experience (47%) or work experience (37%) in their industry or job to be very important.

Similarly, respondents with no specialty were less likely to consider coaching experience (39%), work experience (29%) or other relevant experience (35%) to be very important.

Internal coaches (53%) were more likely than external coaches (44%) to say that work experience is very important to the client.

The Interaction Between Coach and Client

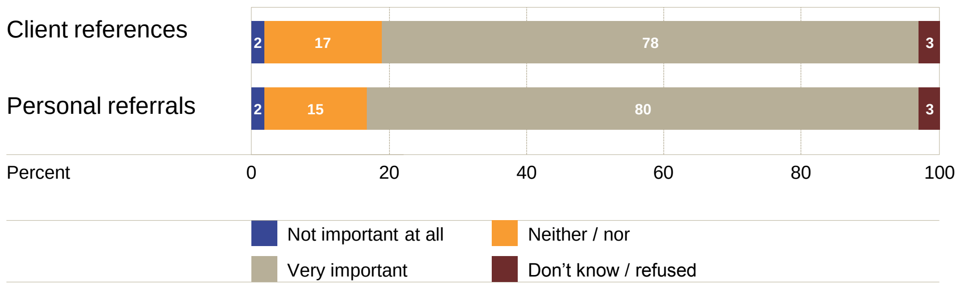
Attributes important to a client: Coach's reputation

Respondents place considerable emphasis on the importance of a coach's reputation to the coaching client's hiring decision.

Four in five respondents (80%) considered personal referrals to be very important. A similar proportion (78%) viewed client references as very important.

There was a considerable degree of consensus amongst respondents regarding the importance of the coach's reputation to the coaching client, with no pronounced contrasts identified either by region or by type of coach.

Importance of coach's reputation



Attributes important to a client: How the coaching is done

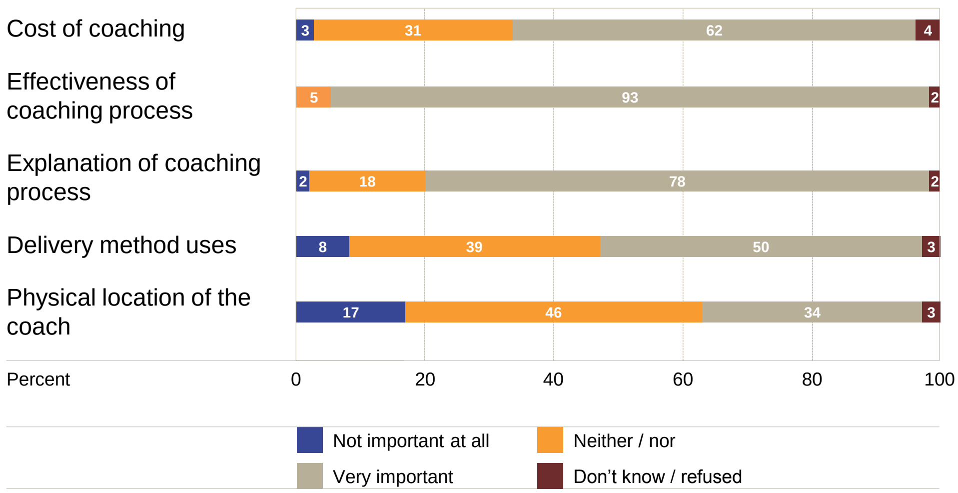
Responses varied markedly when asked about attributes relating to how the coaching is done. This ranged from 93% of coaches considering the effectiveness of the coaching process to be very important to 34% saying that the physical location of the coach is very important.

Regional differences were most apparent in relation to the importance of the physical location of the coach. Fewer than one in four coaches in North America (24%) said location was a very important consideration. This factor was given significantly higher weight by coaches in Latin America and the Caribbean (45%) and the Middle East and Africa (45%). In other regions, between 37% and 41% of respondents described the attribute as very important.

The importance attached to the physical location of the coach also varied significantly with the main method of contact, from 43% among respondents mainly dealing with clients on a face-to-face basis to 21% among those using other main contact methods such as the telephone.

The delivery method used was most likely to be described as very important by coaches in Latin America and the Caribbean (60%) and the Middle East and Africa (60%).

Importance of how the coaching is done



Again, the importance of this factor varied with the main method of contact, from 57% among respondents dealing with clients mainly face-to-face to 41% among other respondents. The explanation of the coaching process was most strongly highlighted in Latin America and the Caribbean (87%) and the Middle East and Africa (84%).

This attribute was more likely to be considered very important by less experienced coaches – 85% of those with less than 1 years experience compared to 73% of respondents who had been coaching 10+ years.

Coaches in Western Europe were least likely to feel the cost of coaching is very important (54%), followed by Oceania (57%). Female coaches were more likely to describe cost as a very important attribute – 65% compared to 58% of male respondents.

Among coaches with active clients, the higher the hourly fee rate, the less likely was the coach to say that cost is a very important factor, from 52% of coaches in the highest quartile of hourly fees to 71% of those in the lowest quartile.

The Interaction Between Coach and Client

Attributes important to a client: Summary

The relative importance to coaching clients of various attributes can be summarized by ranking the attributes according to the proportion of those who found them to be very important.

As can be seen from the accompanying chart, almost all coaches view the effectiveness of the coaching process (93%) and their personal rapport with the client (92%) to be critical considerations in the hiring process.

Coaches are also broadly in agreement on the importance of attributes associated with the coach's reputation (client references/personal referrals) and the explanation of the coaching process. These factors each attracted the support of around four in five respondents.

Substantial majorities of respondents viewed the level of coach-specific training (66%) and the cost of coaching (62%) as very important.

Responses were more variable in relation to the remaining attributes. From the preceding discussion, two general points emerge.

First, there were significant regional differences in the proportions considering various attributes to be very important.

Attributes viewed as most important to client

For example, respondents located in North America and Oceania tended to emphasize experience more than other regions.

By contrast, respondents from Latin America and the Caribbean and the Middle East and Africa placed greater emphasis on coaching credentials and coach-specific training.

These contrasts would suggest some regional differences in the pattern of demand for coaching (what clients expect from their coach) and also perhaps in styles of coaching.

Second, the importance attached to various factors varies with the characteristics of the coach and their position in the marketplace. Often, however, the responses varied in a predictable fashion e.g. the more experienced coaches were more likely to say that number of years as a coach is very important.

Attributes important to the hiring decision of a client (very important %)

	North America	Latin America & the Caribbean	Western Europe	Eastern Europe	Middle East & Africa	Asia	Oceania	Global
	%	%	%	%	%	%	%	%
Level of formal education/schooling	57	71	42	56	60	48	41	52
Level of coach-specific training	61	83	70	67	74	72	55	66
Coaching credential or certification	47	56	50	47	61	50	39	49
Curriculum vitae or resume	47	60	57	59	61	58	51	53
Personal rapport with coach	97	84	90	87	91	83	98	92
Number of clients served	23	41	28	45	35	42	30	29
Number of years as a coach	45	52	50	47	48	54	45	48
Coaching experience in industry or job	59	49	51	47	56	55	61	55
Work experience in industry or job	50	40	41	38	46	46	49	46
Other relevant experience/background	56	40	45	36	51	44	55	49
Personal referrals	81	83	80	80	82	72	84	80
Client references	75	88	78	84	79	78	74	78
Physical location of the coach	24	45	40	41	45	37	37	34
Delivery method used	43	60	54	49	60	53	54	50
Explanation of coaching process	78	87	78	73	84	75	78	78
Effectiveness of coaching process	94	95	91	91	96	88	93	93
Cost of coaching	68	65	54	62	65	63	57	62

The Interaction Between Coach and Client

Delivery methods used by coaches

Globally, two in three respondents (66%) said they mainly deal with their clients on a face-to-face basis. However, the proportion interacting on a face-to-face basis varies sharply by region.

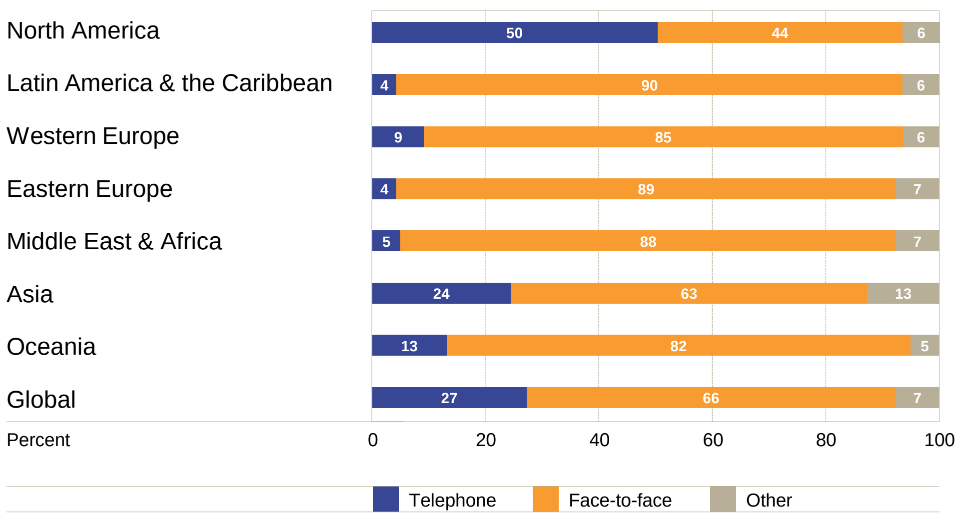
In North America, a minority of coaches (44%) deal with their clients face-to-face and the telephone is the preferred method of contact (50%). Apart from North America and Asia (63%), in all other regions face-to-face is mainly used by over 80% of coaches.

The foregoing regional pattern is very similar to the findings from the *2007 ICF Global Coaching Study*. In most regions, however, there would appear to be a trend towards less reliance on the telephone.

When coaches were surveyed in 2006, 56% of coaches in North America said they relied mainly on the telephone to deliver coaching. This compares with 50% in 2011. Also, in 2006, 19% of coaches in Oceania said they used the telephone compared to 13% in 2011.

While the regional contrast is the most apparent source of variation in main method of contact, some noteworthy differences were also apparent according to the demographic characteristics of the coach and the nature of their engagement with the client.

Main delivery method used



Considering gender of the coach, 63% of females said they mainly coached face-to-face compared with 74% of male coaches. Further, the greater the proportion of sponsored clients, the more likely is the coaching to be done face-to-face.

In fact, 80% of respondents dealing almost entirely with sponsored clients (96%+ of their clients) said they use face-to-face compared with 52% of those with no sponsored clients at all.

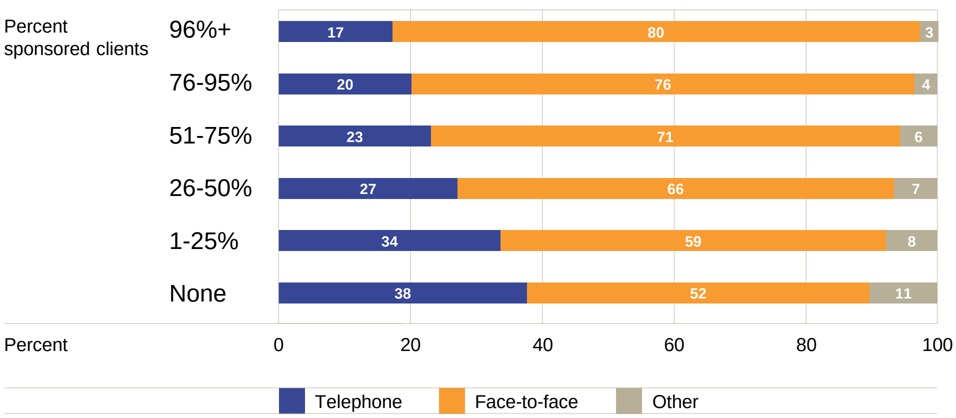
Respondents with typical coaching engagements lasting 12 months or more are more likely to use the telephone (42%) compared with shorter engagements (21% of those with engagements lasting 3 months or less).

Delivery methods used by coaches

The greater the proportion of sponsored clients, the more likely the coaching will be done face-to-face.

Four in five (80%) of those who deal almost entirely with sponsored clients (96%+ of their clients) use face-to-face coaching compared with 52% of those with no sponsored clients at all.

Main delivery method used by % sponsored clients



The Interaction Between Coach and Client

Theoretical models

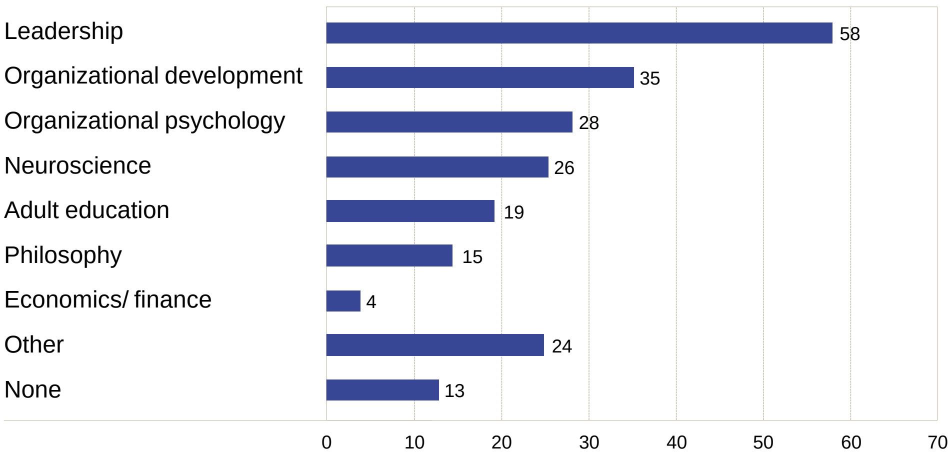
When asked to indicate which theoretical models they draw from when coaching, almost six in 10 respondents (58%) cited Leadership model.

A little over one in three respondents specified Organizational Development (35%), followed closely by Organizational Psychology (28%). Only 13% said they drew upon no theoretical model.

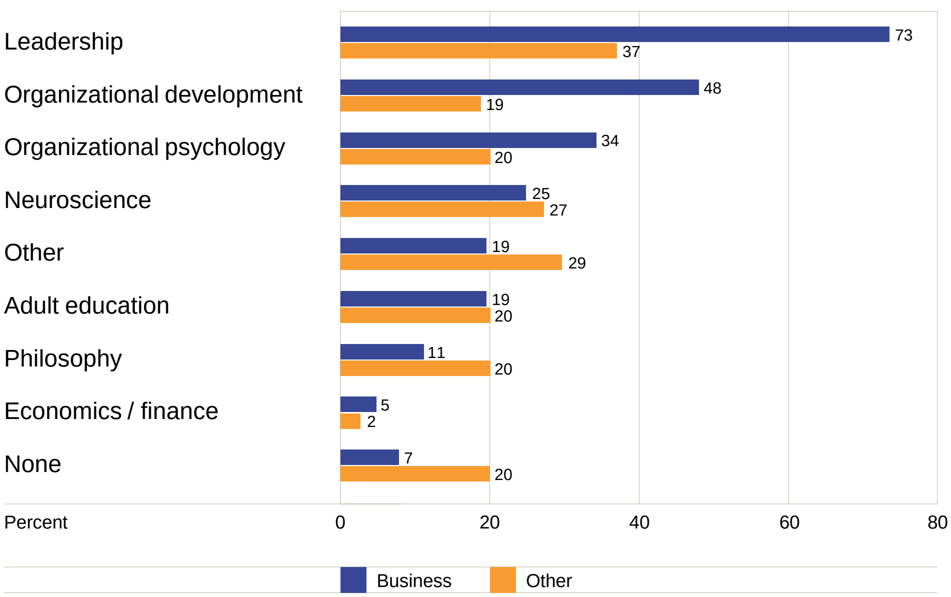
Some regional differences were apparent in the responses. For example, the Leadership model was most frequently mentioned by respondents from Oceania (66%), North America (61%) and Latin America and the Caribbean (60%). Coaches in Europe, both East and West, were the least likely to mention Leadership (52%).

The more important sources of variation in theoretical models related to the main areas of coaching and the client's position. Almost three in four coaches with a business-focused specialty (73%) cited Leadership as a theoretical model compared with 37% of other coaches. A similar disparity could be seen with the use of Organizational Psychology. Similarly, the Leadership model was most often cited by those dealing with executives (77%) and much less frequently by respondents mainly dealing with personal clients (30%).

Theoretical models most drawn from when coaching



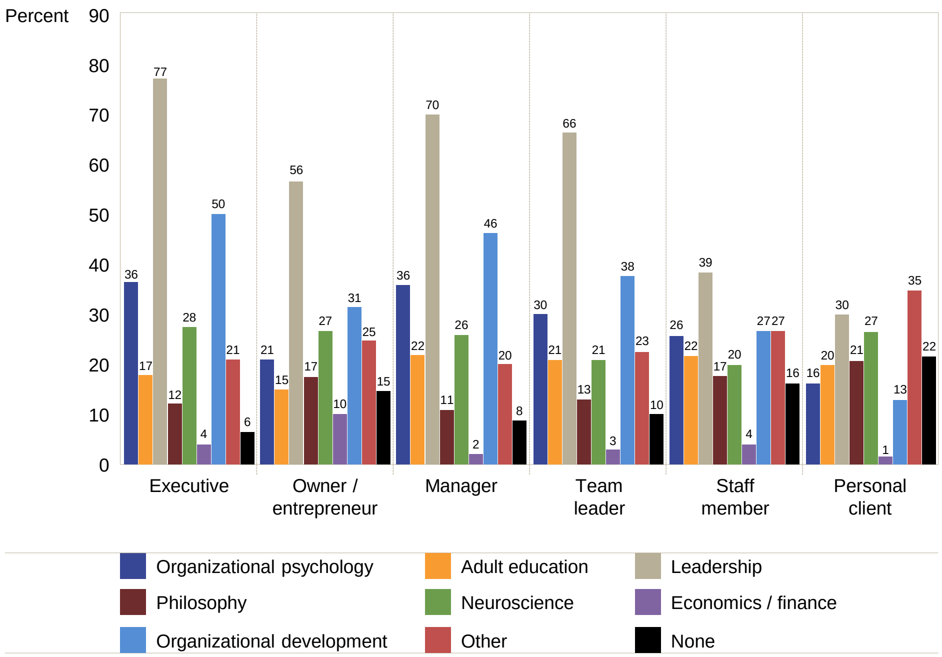
Theoretical models by main area of coaching



Theoretical models

The mix of theoretical models on which coaches draw vary substantially according to the client's position. Coaches dealing mainly with executives drew from an average of 2.5 models, compared with 1.9 models among coaches dealing mainly with personal clients.

Theoretical models used by client position



The Interaction Between Coach and Client

Evaluating impact of coaching

Coaches use a mix of methods to assess the impact of their coaching. Most frequently, coaches use client self-assessments (76%), followed by documenting coaching goals/ benchmarking progress (65%) and feedback interviews (50%).

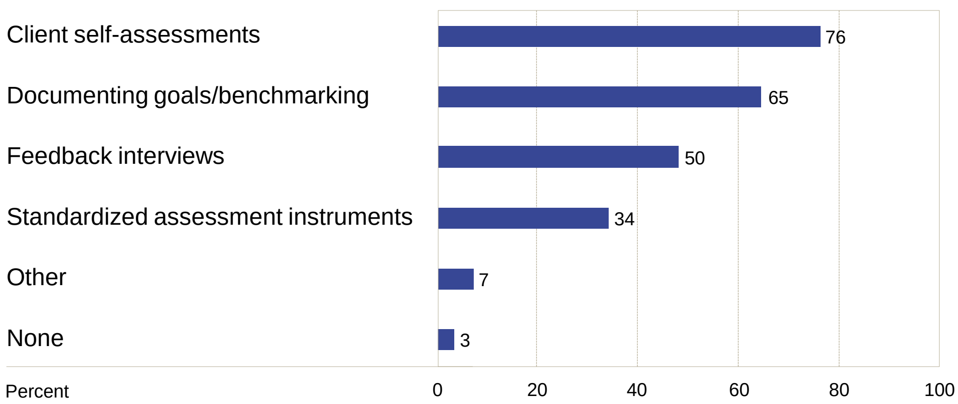
Of the methods shown in the accompanying chart, the typical respondents used an average of 2.4 methods to determine their impact of coaching.

The mix of methods varies according to the coach's main specialty, the position of the client, years coaching and region.

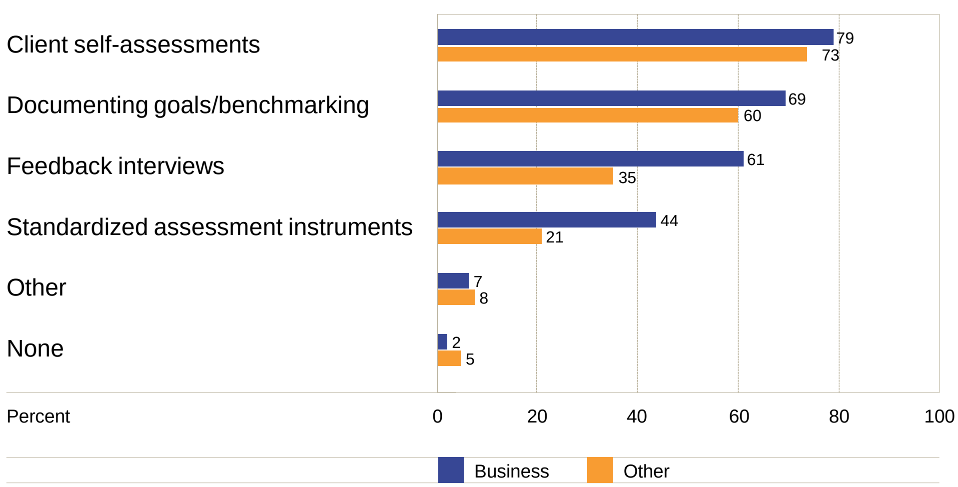
Coaches with a business-focused specialty are considerably more likely to use feedback interviews and standardized instruments (e.g. 360° feedback, emotional intelligence scales, etc) for assessing impact.

Business-focused coaches also typically use a wider range of methods, citing an average of 2.6 methods for assessing impact of coaching. This compares with an average of 2.0 methods used by coaches with some other specialty.

Assessing impact of coaching



Assessing impact of coaching

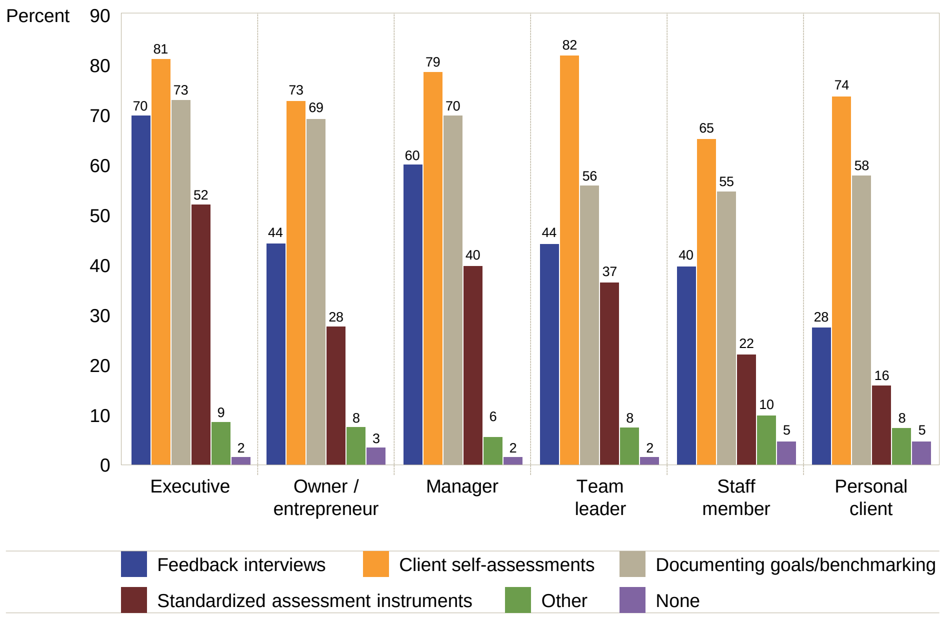


Evaluating impact of coaching

The mix and range of methods used to assess the impact of coaching varies with the position of the client. Respondents who mainly coach executives use nearly three (2.9) methods for assessing impact.

This is followed closely by those coaching managers (2.6), team leaders (2.3), owners/entrepreneurs (2.2), staff members (2.0) and personal clients (1.9).

Assessing impact by position of client

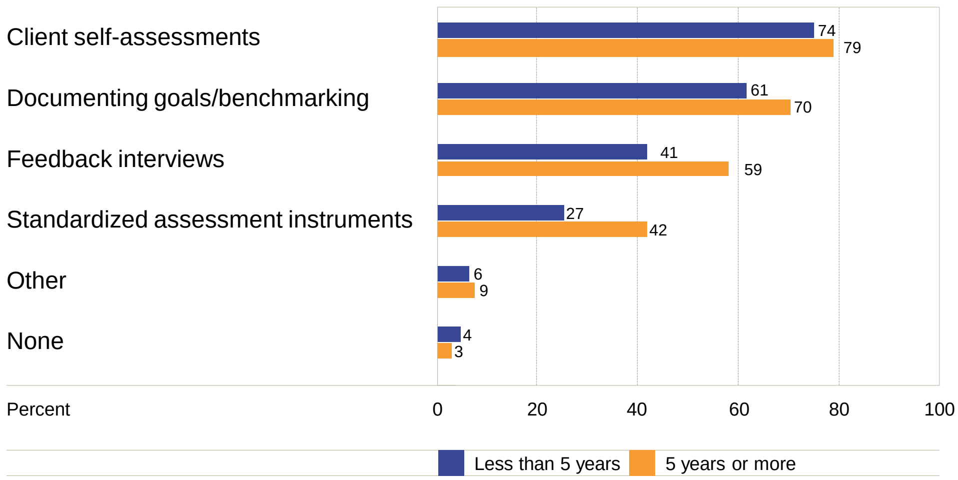


The Interaction Between Coach and Client

Evaluating impact of coaching

The range of methods deployed for assessing the impact of coaching varies with the number of years coaching. Among those with 5+ years coaching, an average of 2.6 methods are used compared with 2.1 for those with less than 5 years experience.

Assessing impact of coaching



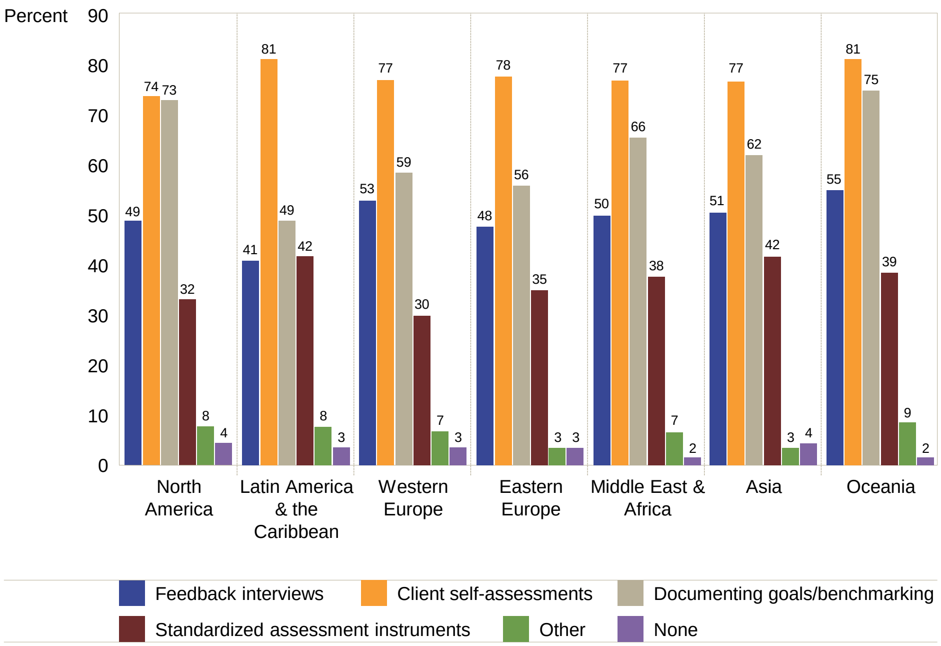
Evaluating impact

As a method for assessing impact, documenting coaching goals and benchmarking progress varies widely by region, from 75% in Oceania to 49% in Latin America and the Caribbean.

Standardized instruments are most frequently used in Latin America and the Caribbean (42%) and least often in Western Europe (30%).

The average number of methods used is highest in Oceania (2.6) and lowest in Latin America and the Caribbean (2.2).

Assessing impact: Methods used by region



The Interaction Between Coach and Client

Business indicators: Summary

Across a range of indicators, including delivery methods, theoretical models and methods for assessing impact, the mode of interaction between coach and client varies along a number of dimensions, including the coach's main specialty, years coaching, position of the client and region.

Therefore, it is not surprising to find that the key business indicators also vary with the mode of interaction. For example, both average annual revenue/income and hourly fee rates are higher for coaches who mainly interact with their clients on a face-to-face basis.

The differential largely reflects the contrasts in the characteristics of coaches who use face-to-face rather than telephone.

Similarly, revenues and fee rates are positively linked to the number of methods a coach uses for assessing impact.

This is mainly due to the fact that coaches with higher revenues and fee rates, such as those with a business specialty and who coach executives, also tend to use more methods for assessing the impact of their coaching.

Business indicators

	Annual revenue	Reported 1 hour fee	Clients	Hours
	US$	*US$*		
Main delivery method				
Telephone	40,700	210	10	14
Face-to-face	50,900	240	10	13
Other	47,500	200	10	14
Number of methods used to evaluate coaching method				
None	31,600	150	10	13
1	33,400	180	9	12
2	37,000	200	9	12
3	50,800	240	11	14
4-5	77,300	330	13	16

However, the number of methods used has an additional effect on revenues and fee rates that is over and above the consequential effects from the type of coaches who are more likely to use a mix of methods.

The Interaction Between Coach and Client

Key points summary

The key points to be noted in relation to the interaction between coach and client are as follows:

- When asked about attributes that they believe clients prioritize in their hiring decision, there was a considerable degree of consensus around the importance of the effectiveness of the coaching process, personal rapport with the client, the personal reputation of the coach and the explanation of the coaching process.
- Responses were more variable in relation to other attributes that could impact a hiring decision, such as experience, training and credentials, and how the coaching is done. Differing regional perspectives on these attributes were the main source of variability. These contrasts would suggest some regional differences in the pattern of demand for coaching (what clients expect from their coach) and also perhaps in styles of coaching.
- Globally, the majority of coaches (66%) interact with their clients on a face-to-face basis. However, there are sharp regional contrasts, as a minority of coaches in North America mainly deal with clients face-to-face (41%). As was the case in 2006, the telephone remains the preferred method of dealing with clients in North America (50%).
- When asked to indicate which theoretical models they draw from most often when coaching, almost six in 10 respondents (58%) cited a Leadership model. Just more than one in three respondents (35%) specified Organizational Development, followed closely by Organizational Psychology (28%). Only 13% said they drew upon no theoretical models at all.
- While regional differences were observed, the more important sources of variation in theoretical models used related to the main areas of coaching and the client's position.
- Coaches use a mix of methods to assess the impact of their coaching. Most frequently, coaches use client self-assessments (76%), documenting coaching goals/benchmarking progress (65%) and feedback interviews (50%).The mix of methods varies according to the coach's main specialty, the position of the client, years coaching and region.
- Revenues and fee rates are positively linked to the number of methods a coach uses for assessing impact. This underscores the need for coaches to explain thoroughly the coaching process to their clients and share with them the many methods used to determine the ROI from coaching.

Section 7

Key Issues and Future Trends

Key Issues and Future Trends

Introduction

The *2012 ICF Global Coaching Study* provided coaches with the opportunity to comment on a range of issues facing the coaching profession in the future, including regulation of coaching, restrictions on coaching, obstacles and opportunities.

This section presents the survey findings under the following headings:

- Views on coaching as a profession.
- Business model changes.
- Regulation of coaching.
- Restrictions on coaching.
- Future obstacles.
- Future opportunities.

Key Issues and Future Trends

Views on coaching

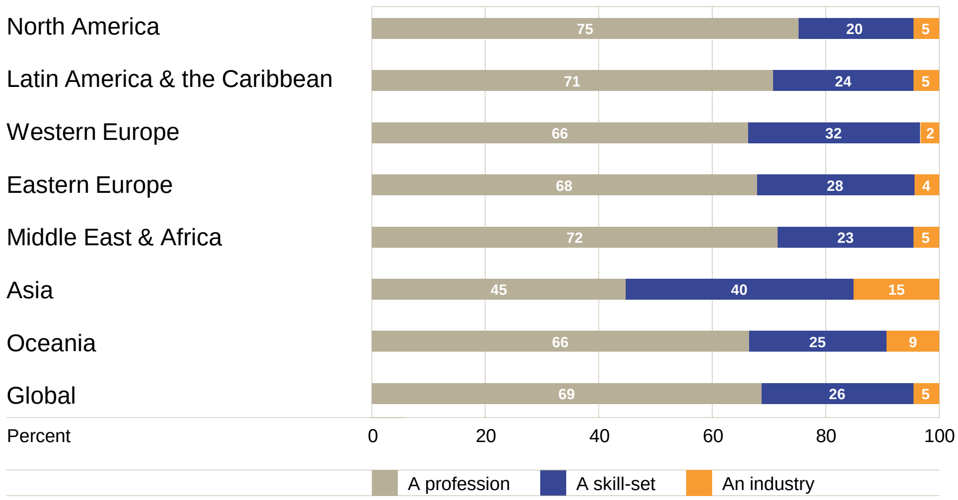
Currently, a large majority of respondents view coaching as a profession (69%) rather than a skill-set (26%) or an industry (5%).

Respondents' views on coaching varied significantly by region. Coaching is most strongly viewed as a profession in North America (75%).

By contrast, in Asia, fewer than half of respondents view coaching as a profession (45%) compared with 40% who consider it to be a skill-set.

Almost one in three respondents from Western Europe (32%) and one in four from Oceania (25%) viewed coaching as a skill-set (35%), significantly in excess of the North America figure of 20%.

"I view coaching as . . . "



Views on coaching

Perspectives on coaching also varied strongly by age group. Over three-quarters of those aged over 55 view coaching as a profession (76%) compared with 56% of respondents aged 35 and under.

The proportion viewing coaching as a profession also varied by:

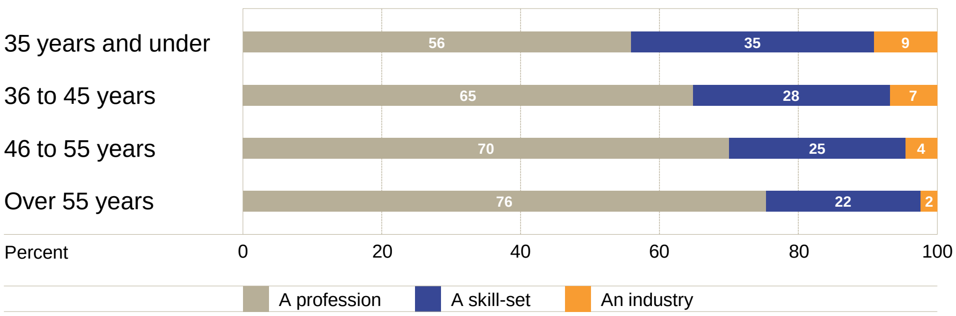
Gender – 71% of females compared to 64% of males.

Internal/external – 70% of external coaches versus 60% of internal coaches.

Active membership affiliations of an association – 70% of respondents with 1+ memberships vs. 60% of those with no membership or none stated.

Active coaches – 70% of respondents with currently active clients compared with 59% of coaches with no active clients.

Views on coaching by age



Business model changes

When asked what changes, if any, they had made to their coaching business in the past 12 months, a large majority (86%) indicated they had made at least one change. Most frequently, respondents said they had increased collaboration with other coaches (47%), and offered services in addition to coaching (41%).

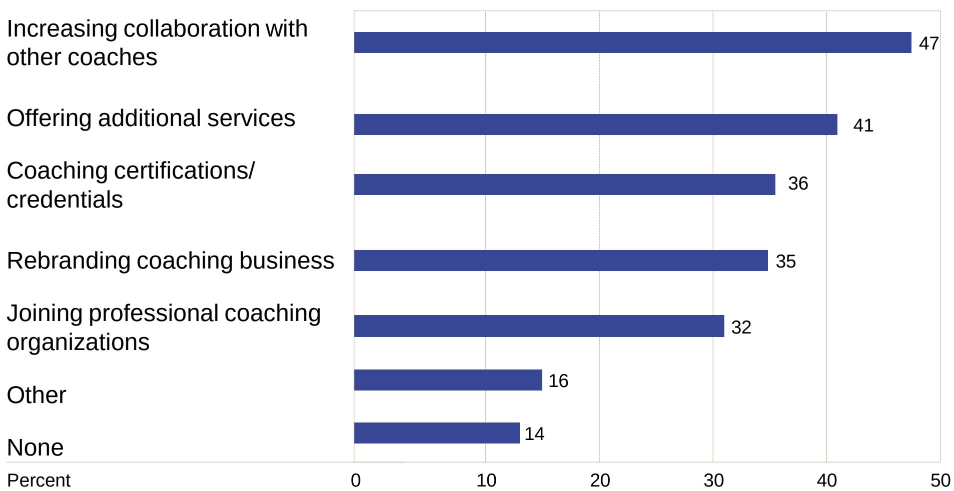
The global rank order of business model changes did not vary greatly by region. Increasing collaboration and additional services were cited most often across each of the world regions.

However, respondents located in the emerging regions were more likely to mention multiple business model changes compared to those in the established high income regions.

For example, coaches in Latin America and the Caribbean made an average of 2.4 of the changes listed in the accompanying chart, compared to 2.0 each in North America, Western Europe and Oceania.

Achieving coaching certifications/ credentials was most often mentioned by respondents in Latin America and the Caribbean (47%), Eastern Europe (42%) and the Middle East and Africa (42%).

Business model changes last 12 months



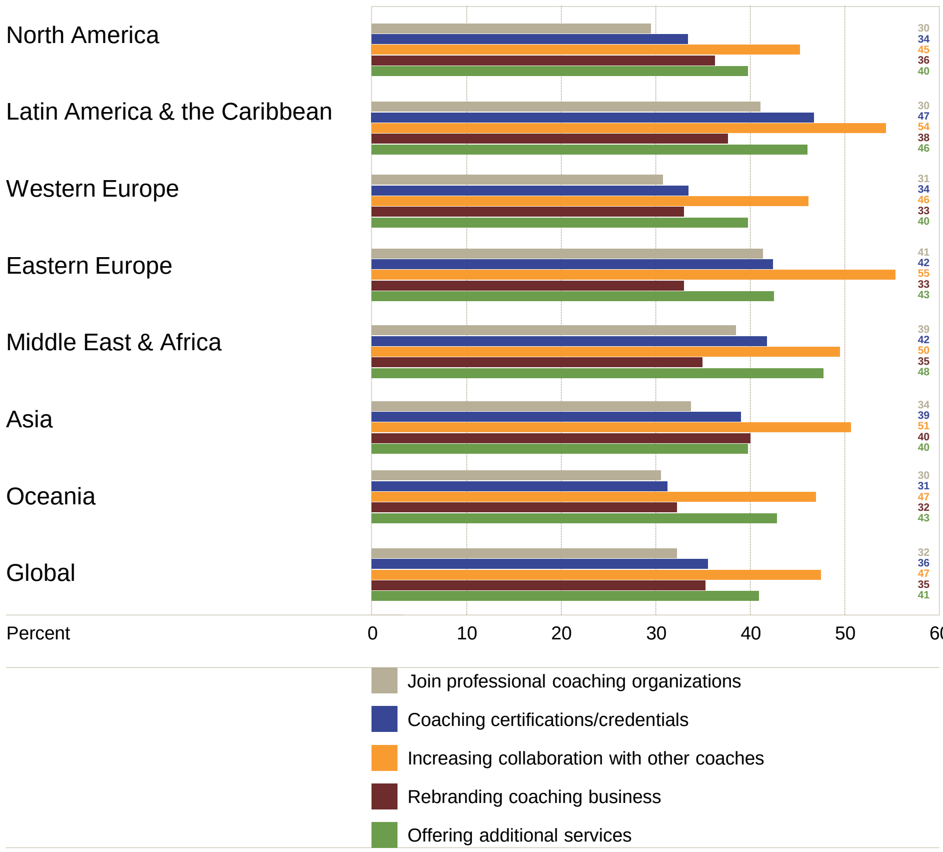
Respondents in North America (34%), Western Europe (34%) and Oceania (31%) were less likely to mention that they achieved coaching certifications/ credentials in the last 12 months.

A similar regional pattern was observed in respect of joining professional associations.

Business model changes

Compared to their counterparts in the higher income regions, coaches in the emerging regions were more likely to have implemented various changes to their business model over the past 12 months.

Business model changes last 12 months by region



Business model changes

The likelihood of making a business model change, particularly obtaining a credential and joining professional organizations, and the pattern of changes varied, however, with the number of years coaching.

Respondents with 2 or fewer years coaching experience made an average of 2.5 changes over the previous 12 months, compared with 1.7 among those with 10+ years experience.

Mainly, this was due to a greater propensity among the less experienced coaches to join professional associations and obtain their coaching certifications/ credentials.

It is likely that many of the more experienced coaches would have already implemented such changes. Nonetheless, the survey results are indicative of an appetite among younger coaches for achievement of coaching certifications/credentials and joining as a member professional associations.

The remaining business model changes did not vary as strongly with years of coaching experience. In particular, the proportion who said they increased collaboration with other coaches did not vary greatly given their years of coaching experience.

The pattern was broadly similar in respect of changes related to offering services in addition to coaching and rebranding the coaching business.

Interestingly, respondents who had experienced increases across all four key business indicators discussed in section 2 (clients, fees, sessions and revenue/income) were also the most likely to have made changes to their business model in the past 12 months; an average of 2.4 changes compared with 1.7 among respondents who did not experience an increase across any of the four trend indicators.

Among those changes, increasing collaboration with other coaches was mentioned by 55% of those who had experienced an increase across all four key trend indicators, compared with 39% of respondents who did not experience an increase in revenues, fees, clients or hours worked.

Coaches who had experienced an increase across all four key trend indicators were also the most likely to include joining a professional coaching organization (37%) and/ or achieving coaching certifications/ credentials (44%) among their changes made over the past 12 months.

Among those who did not see an increase in the business indicators, the corresponding figures were 26% joining professional organizations and 28% gaining coaching certifications.

Although it can be observed that a statistical correlation exists between business model changes and increases in the business indicators, this does not necessarily prove that the changes alone caused the business indicators to increase.

Business model changes

	Average number business model changes	Join professional coaching organizations	Achieving coaching certifications/ credentials	Increase collaborations with other coaches	Rebranding coaching business	Offering services in addition to coaching	Other	No business model changes made
	No.	*%*	*%*	*%*	*%*	*%*	*%*	*%*
Years coaching								
2 years or less	2.5	51	54	51	36	41	14	8
3 to 4 years	2.2	35	38	49	37	43	15	12
5 to 10 years	1.9	24	29	46	35	41	17	15
More than 10 years	1.7	19	21	44	34	38	19	21
Number of key indicators increasing (clients/sessions/fees/revenue) last 12 months								
No indicator	1.7	26	28	39	30	37	13	21
1 indicator	2.0	29	33	46	36	39	16	15
2 indicators	2.1	34	38	48	31	40	16	12
3 indicators	2.2	35	37	51	37	43	17	11
All four indicators	2.4	37	44	55	43	46	19	9

Regulation of coaching

Overall, just more than half of respondents (53%) believe that coaching should become regulated. Almost one in four (24%) offered no opinion with the remaining 23% disagreeing.

The proportion of coaches favoring regulation was significantly lower in North America (42%), but still in excess of those in the region who did not agree that coaching should be regulated (30%).

In every other region outside of North America, the majority of respondents favored regulation, ranging from the Middle East and Africa (73%) to Asia (52%). Overall, 62% of respondents outside of North America favor regulation; 17% disagree; and 21% are unsure.

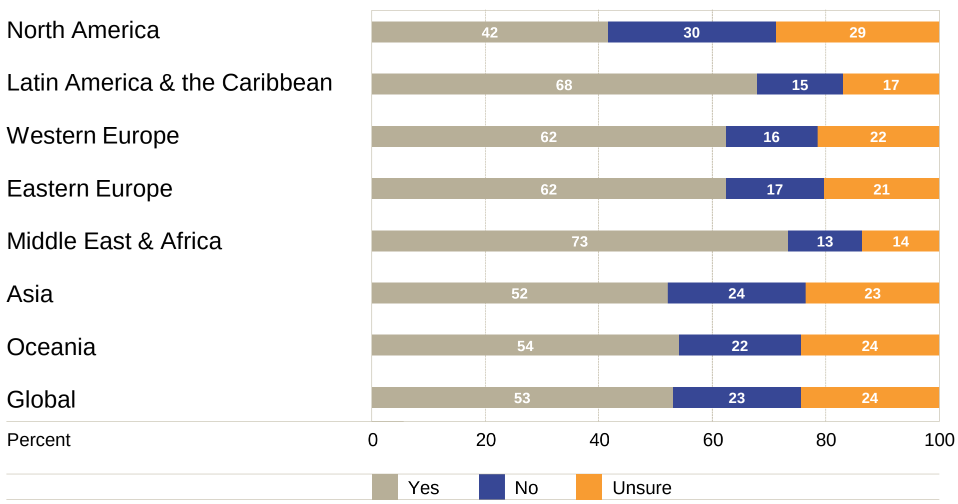
After allowing for the regional effect, coaches also differed in their views on regulation along a number of demographic perspectives, including:

Gender – female coaches are more likely than males to favor regulation.

Age of coach – the younger the coach, the more likely to favor regulation.

Internal/external – internal coaches are more favorably disposed towards regulation than external coaches.

Should coaching become regulated?



Years coaching – the proportion favoring regulation declines as the number of years of coaching experience increases.

Memberships – those in a professional organization and/or with a certification/credential are more likely to favor regulation.

Regulation of coaching

Regulation: Percent agreeing

	North America	Regions outside of North America	Global
	%	%	%
Global	42	62	53
Gender			
Female	43	65	55
Male	36	57	50
Age of coach			
35 and under	46	68	64
36-45	46	65	60
46-55	42	60	52
56+	39	54	45
Internal/external			
Internal	47	69	59
External	41	60	52

Regulation: Percent agreeing

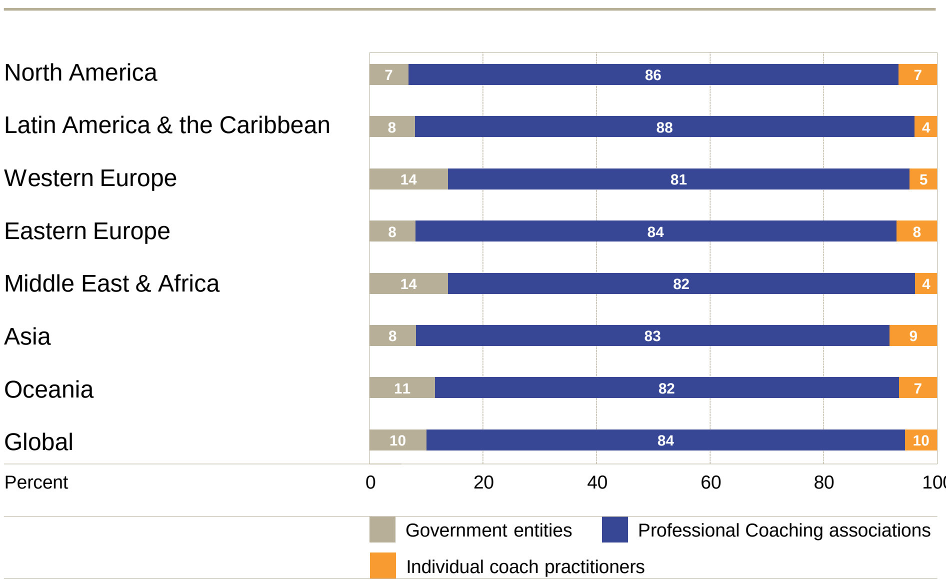
	North America	Regions outside of North America	Global
	%	%	%
Years coaching			
Less than 1 year	47	66	60
1 to 2 years	50	70	63
3 to 4 years	46	67	59
5 to 10 years	42	58	51
More than 10 years	31	46	38
Membership			
ICF	44	63	55
Other	32	59	52
None/not stated	35	59	50
Credential			
ICF	48	67	58
Other	37	59	51
None/not stated	38	59	51

Who should regulate?

Among those who did not rule out the prospect of regulation the overwhelming majority (84%) felt that professional coaching associations were best placed to regulate the industry.

Respondents' views did not vary greatly on the question of kind of body best placed to regulate coaching. Coaches in Western Europe and the Middle East and Africa were more likely to suggest that regulation should be done by a government body (14% in each region). But even in those regions, regulation by professional coaching bodies attracted the support of over 80% of respondents.

Who should regulate?



Albeit in a slightly different form, the issue of whether coaching should be regulated was also addressed in the *2007 ICF Global Coaching Study*.

The findings are broadly similar to those emerging from the 2011 Survey. When coaches were prompted in 2006, a majority agreed that coaching should be regulated (30% slightly, 35% strongly).

Coaches in North America were most likely to disagree strongly (15%).

Similarly, female coaches were more inclined to favor regulation than male coaches.

The findings from the *2009 ICF Global Coaching Client Study* would also suggest that coaching clients favor regulation.

In that study, 39% of clients thought it very important that coaching should be regulated with a further 39% considering it somewhat important.

Of those believing it (very or somewhat) important that coaching should be regulated, 81% thought that professional coaching associations should have responsibility. Only 11% indicated that government should be responsible.

On the issue of regulation, therefore, the views of coaches would appear to have been consistent over the last five years and are very much in alignment with the preferences of coaching clients.

Restrictions on coaching

Overall, the vast majority of respondents (81%) indicated there were no areas where they were restricted or limited in any way from offering coaching services.

Nonetheless, almost one in five coaches (19%) face some type of restrictions on their activities. Restrictions or limitations arise mainly in the sphere of financial planning (16%), most notably in the region of Oceania (40%).

The regional contrast is the primary source of variation in the proportions saying they face at least one restriction on their coaching practice.

	Financial planning/ investments	Career transition/ job placement	Other areas of coaching	Not restricted in any areas
	%	%	%	%
North America	16	2	2	82
Latin America & the Caribbean	11	6	3	85
Western Europe	15	3	3	82
Eastern Europe	11	9	1	83
Middle East & Africa	13	5	3	81
Asia	12	8	3	81
Oceania	40	4	5	58
Global	16	4	3	81

Future obstacles

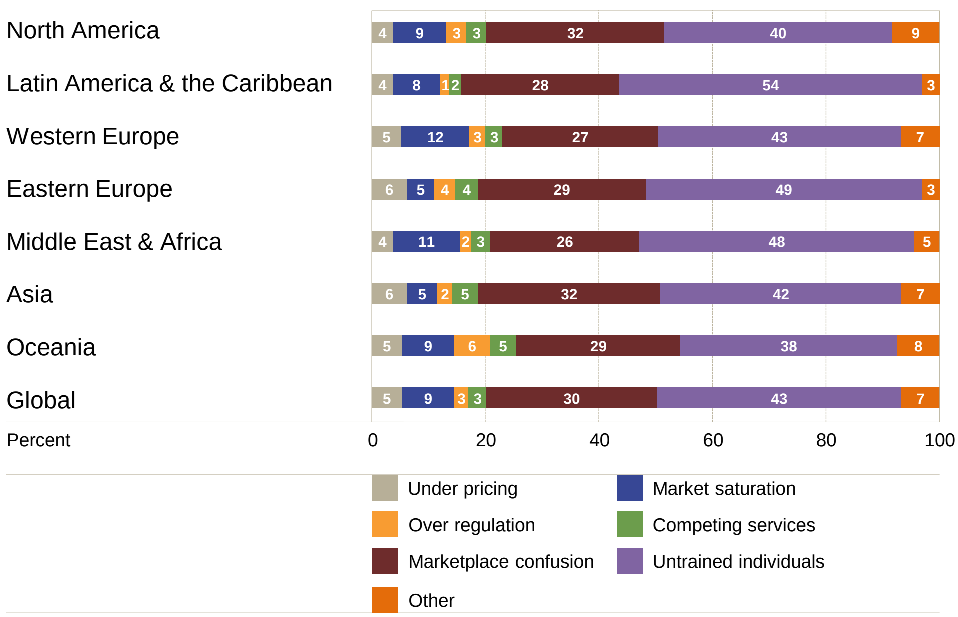
When asked to identify the biggest obstacle for coaching over the next 12 months, the main concern expressed by respondents was untrained individuals who call themselves coaches.

Compared to the global average (43%), this concern was most acutely felt in Latin America and the Caribbean (54%), followed by Eastern Europe (49%) and the Middle East and Africa (48%).

Credentialed coaches also expressed a higher level of concern; 45% compared to 40% of other coaches.

Respondents who mainly coach executives expressed a significantly greater level of concern regarding untrained individuals; 47% compared with 40% of those who mainly coach personal clients.

Future obstacles



Marketplace confusion about the benefits of coaching was cited by 30% of coaches. Respondents with fewer years of coaching experience were more likely to highlight this obstacle; 37% of those with two years or less coaching experience falling to 21% among coaches with 10 or more years experience.

When analyzed by the client's position, concern about marketplace confusion was most often voiced by those who mainly coach personal clients (35%) and least often by those who mainly coach executives (22%).

Fewer than one in 10 respondents said coaching market saturation would be an obstacle over the next 12 months.

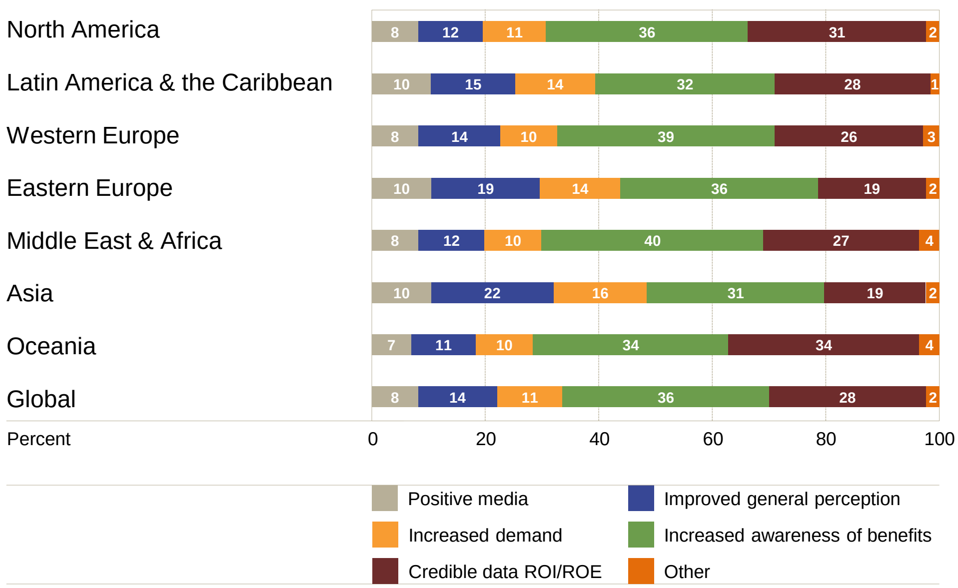
Also, relatively few coaches foresaw obstacles around under-pricing of services (5%), over regulation of coaching (3%) or increased demand for services that compete with coaching (3%).

Future opportunities

When asked to identify the biggest opportunity for coaching over the next 12 months, respondents were most likely to identify increased awareness of the benefits of coaching; holding consistent both globally (36%) and across each of the seven world regions. A further 28% highlighted credible data on the return on investment (ROI)/return on expectations (ROE) from coaching.

The extent to which these two factors are seen as opportunities varies both regionally and with certain demographic characteristics of the coach. Compared to other regions, respondents from Eastern Europe and Asia were less likely to respond that credible data on ROI/ROE presents the biggest coaching opportunity for coaching; 19% in both regions compared to the 28% global average.

Future opportunities



Compared to those with fewer years coaching, the seasoned coaches were more likely to highlight credible data on ROI/ROE and less likely to emphasize increased awareness of benefits.

Among those with 10+ years experience, nearly one-third (32%) mentioned credible data on ROI/ROE versus 19% of respondents with less than 1 year's experience.

Conversely, 41% of the latter highlighted increased awareness of benefits compared with 33% of respondents with 10+ years coaching.

Similarly, respondents who mainly coach executives were more likely to mention credible data on ROI/ROE (35%) than those who deal with personal clients (15%).

In general, business-focused coaches were also less likely than other coaches to mention increased awareness of benefits (34% compared to 40%) as a biggest opportunity for coaching over the next 12 months.

Male and female coaches were equally likely to cite increased awareness of benefits (36%), but a higher proportion of female coaches (29%) than male coaches (25%) viewed more credible ROI/ROE data as the biggest opportunity.

Future opportunities

Overall, just more than one in five respondents (22%) mentioned either positive portrayal of coaching in the media (8%) or improved general perception of coaching (14%) as the biggest opportunity for coaching over the next 12 months.

On a regional basis, these two factors were most likely to be mentioned by respondents from Asia, where 32% specified either positive portrayal of coaching (10%) or improved general perception (22%).

Respondents from Eastern Europe were also more likely to mention these two opportunities; 10% mentioned positive media portrayal with a further 19% citing improved general perception. These two opportunities were least frequently mentioned in North America (combined total of 19%) and Oceania (18%).

In general, business-focused coaches were less likely than other respondents to view positive media portrayal or improved general perception as the biggest coaching opportunities.

In fact, these two factors were cited by fewer than one in five business-focused coaches (19%) compared with 27% of other respondents with some other main concern.

A similar contrast was observed between those who mainly coach executive clients (17%) and those who mainly coach personal clients (28%).

Slightly more than one in 10 respondents (11%) viewed increased demand for coaching services as the main opportunity for coaching over the next 12 months.

The proportion mentioning increased demand varied somewhat by region. Coaches in the emerging regions of Asia (16%), Latin America and the Caribbean (14%) and Eastern Europe (14%) were above the global average in pointing to increased demand as a future opportunity.

Key points summary

The key points to be noted from the survey responses regarding issues facing the profession are as follows:

- Overall, a strong majority of respondents view coaching as a profession (69%) rather than a skill-set (26%) or an industry (5%).
- When respondents were asked what changes, if any, they had made to their coaching business model in the past 12 months, the vast majority (86%) said they had made at least one change. Most frequently, respondents said they had increased collaboration with other coaches (47%), followed closely by offering services in addition to coaching (41%).
- Business model changes around achieving coaching certifications/credentials and/or joining professional associations were most often mentioned by coaches located in the emerging regions and also by coaches who were at the outset of their careers.
- Overall, just more than half of coaches (53%) believed that coaching should become regulated. However, almost one in four (24%) responded unsure on the matter and the remaining 23% disagreed that coaching should become regulated.
- On a regional basis, the proportion of coaches favoring regulation was much lower in North America (42%), but still in excess of those in that region who felt that coaching should not be regulated (30%).
- Among those who believe coaching should be regulated, or who were unsure, the overwhelming majority (84%) felt that professional coaching associations were the ones best placed to regulate coaching.
- One in five respondents face restrictions on their activities, mainly in the sphere of financial planning.
- Untrained individuals who call themselves coaches were viewed as the main obstacle for coaching over the next 12 months (43%), followed by marketplace confusion about the benefits of coaching (30%).
- The main opportunities for coaching over the next 12 months were identified as increased awareness of the benefits of coaching (36%) and credible data on the return on investment (ROI)/return on expectations (ROE) from coaching (28%).

Technical Appendix

Technical Appendix

Introduction

This section presents the approach to the *2012 ICF Global Coaching Study*, under the following headings:

- Questionnaire design.
- Definitions.
- Survey fieldwork.
- Survey outcomes.
- Regional classification.
- Number of coaches – estimation.
- Number of coaches – membership ratio method.
- Memberships in the ICF Global Coaching Study
- Modified membership ratio method
- Quantitative indicators
- Secondary data sources.
- Comparability.

Technical Appendix

Questionnaire design

The questionnaire for the *2012 ICF Global Coaching Study* comprised four main sections:

The coach. The first set of questions asked respondents to provide information relating to their location, age, education, training and coaching credentials.

This section also asked respondents to say if they are currently a member of any professional organizations, whether they are an internal or external coach, their hours per week working as a coach, and their main coaching specialty.

The client. This second set of questions sought information on various attributes of the people to whom the respondents 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 respondents about their engagements, including main areas of coaching, theoretical models used in coaching, and the length of a typical engagement.

The size of the profession. This section asked respondents to provide details of their annual revenue or income generated by coaching only, the average fee for a 1 hour coaching session, the key revenue trends over the last 12 months in (numbers of clients, average fees, coaching sessions and annual revenue/income).

Coaches were also asked to forecast how they expect these same key indicators would evolve over the next 12 months.

Key issues facing the industry. The final section sought respondent views on a range of issues that may affect the future direction of the profession.

This included whether coaching should be regulated, possible restrictions on coaching in the area where the respondent works, and many of the obstacles and opportunities facing coaching in the future.

The survey was designed to extend and further develop the range of topics covered in the questionnaire used for the *2007 ICF Global Coaching Study*, which was undertaken in late-2006.

Compared to the first study, the latest survey addresses a number of additional topics (e.g. the attributes that coaches consider may be important to client hiring process).

Other topics were significantly extended in the latest questionnaire (e.g. membership and certified/ credentialed coaching associations).

In order to keep the 2011 version of the questionnaire to a manageable length, several questions were also not carried forward from the 2006 survey (e.g. whether the coach considers her/himself to be full-time or part-time). These changes limit the comparability between the two surveys.

Nonetheless, in reporting on the *2012 ICF Global Coaching Study*, comparisons are made to the *2007 ICF Global Coaching Study* where relevant.

Technical Appendix

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 questionnaire:

- **Professional Coach** – 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.
- **Coach specific training** – encompasses theories and core coaching competencies that are designed to prepare an individual to practice as a professional coach.
- **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.
- **Internal coach** – a professional coach, who is employed within an organization and has specific coaching responsibilities identified in their job description.
- **External coach** – a professional coach, who is either self-employed or partners with other professional coaches, to form a coaching business.
- **Coaching** – partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.
- **Client** – the person who is being coached.
- **Active client** – any client who you are providing coaching services to at this time.

Technical Appendix

Survey fieldwork

Following a pilot testing phase, the survey was launched online on 6 June 2011, when all ICF member coaches were sent a personalized invitation and survey link.

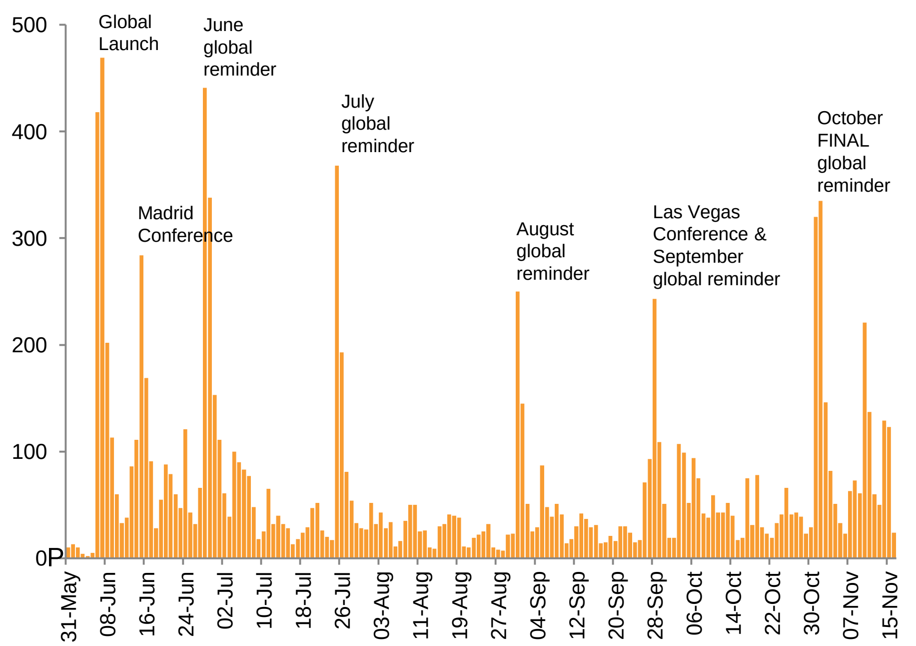
As most of the communication with members by the ICF is undertaken by e-mail, the membership database provided access to accurate and comprehensive contact details. ICF members also were asked to send a generic link to the online survey registration site on to their wider networks of coaches, to encourage the participation of non-ICF members.

Strategic alliances with ICF Chapters and other coaching organizations were utilized to promote the study and provide details on how other coaches could access the online registration site.

Global participation was also facilitated by making the online questionnaire available for completion in nine languages (English, French, German, Italian, Japanese, Korean, Portuguese, Mandarin, Spanish).

Participation was further enabled by designing the survey to be completed using QR codes and in a manner compatible with most mobile phones and tablets.

Survey Fieldwork



In order to maintain participant momentum over the six month survey fieldwork phase, monthly global reminders were issued to coaches on the ICF database who had not yet responded.

Further, new ICF members were also onboarded through the monthly reminders. Key events such as the Madrid, Santiago and Las Vegas ICF Conferences were also used as a platform to encourage wider participation in the survey.

The periodic global reminders and key events clearly played an important role in maintaining momentum over the six month survey fieldwork phase. Indeed, there were no zero return days over the period from survey launch to the final close on 15 November 2011.

Technical Appendix

Survey outcomes

A total of 15,266 individuals registered online to take part in the survey. Of these, 12,133 (79%) provided valid responses:

- The respondent answered in the affirmative when asked if he/she is a professional coach (the screening question was located at the start of the questionnaire).

- The respondent completed the questionnaire in full (11,367 responses) or completed at least the first 50% of the questions, out of 40 (766 responses).

Of the 12,133 valid responses, 7,736 were from respondents identifying themselves as ICF members. When compared with the total of 23,061 surveys issued via the ICF member database, the ICF member response rate was in the range of 33%.

A total of 3,133 (21%) responses were not useable. Most often, this was determined at the screening stage, as 1,692 respondents confirmed that they were not professional coaches.

The remaining non-useable returns comprised two groups: those which were deemed to be incomplete (897) and those who had registered but not proceeded to the questionnaire by the time the survey fieldwork closed on November 15 2011 (544).

Survey responses

	Survey responses	Percent
Total	15,266	100
Of which:		
Valid	12,133	79
Of which:		
ICF	7,736	51
Other	4,397	29
Not useable	3,133	21
Of which:		
Screened out	1,692	11
Incomplete	897	6
All other	544	4

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Regional classification

For reporting purposes, the 117 participating countries were classified to 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:

- **North America**. Comprised of the U.S. and Canada. The valid responses from this region totaled 4,976 (41%).

- **Latin America and the Caribbean**. Comprised of South America, Central America and the Caribbean (including Puerto Rico, on the basis of its central location within the Caribbean). A total of 954 valid responses were received from this region (8%).

- **Western Europe**. Bounded to the east by Germany and Austria, with Finland included in this grouping to preserve the Nordic cluster. A total of 3,418 valid responses (28%).

- **Eastern Europe**. The remainder of continental Europe and Russia. This region includes also a number of countries which are geographically part of the continent of Asia (e.g. Turkey, Armenia, Azerbaijan and Georgia) but which have various political and cultural links to Europe (e.g. Membership of the Council of Europe and also UEFA, the European football association). A total of 706 valid responses (6%).

- **Middle East and Africa**. The continent of Africa plus the Gulf States. Valid survey responses amounted to 421 (3%).

- **Asia**. The continent of Asia, except those countries classified to Eastern Europe and the Middle East and Africa regions. A total of 978 valid responses were received from Asia (8%).

- **Oceania**. Based on the United Nations classification, mainly Australia and New Zealand, including also the Pacific Island groupings of Melanesia, Micronesia and Polynesia. The region generated 680 valid responses (6%), almost all from Australia and New Zealand.

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Valid survey responses by world region

	All		Of which:			
			ICF Members		Non-ICF	
	Coaches	% of global	Coaches	% of all	Coaches	% of all
North America	4,976	41	3,565	72	1,411	28
Latin America & the Caribbean	954	8	535	56	419	44
Western Europe	3,418	28	2,038	60	1,380	40
Eastern Europe	706	6	388	55	318	45
Middle East & Africa	421	3	211	50	210	50
Asia	978	8	526	54	452	46
Oceania	680	6	473	70	207	30
Global	12,133	100	7,736	64	4,397	36

Number of coaches: Estimation

As the survey results show, coaching truly is a global profession. However, there are no definitive and accepted lists or counts of the total number of coaches, whether by country, world region or globally.

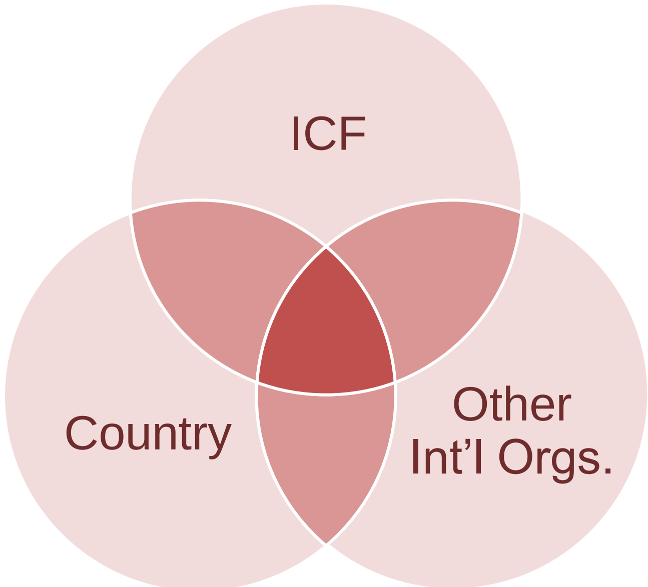
To estimate the number of coaches, one alternative approach would be to compile a list of all coaching-related membership associations and obtain counts of the number of coaches within each association.

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-specific orientation.

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

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

The population of coaches: A membership-based framework



No membership affiliations

Technical Appendix

Number of coaches: Membership ratio method

A second approach is to implement a 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 could 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 the sake of simplicity, 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.

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Memberships in the ICF Global Coaching Study

A singular advantage of the *2012 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.

In particular, information is available on membership overlaps and non-membership.

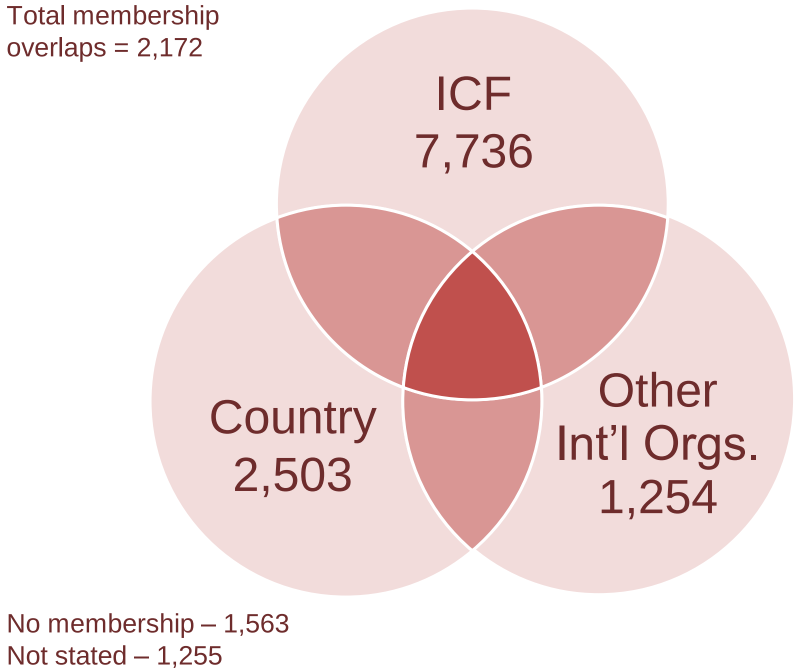
In addition to what is confirmed ICF membership, the survey asked respondents to indicate their membership of a number of other international associations i.e.:

- Association for Coaching (AC).
- European Mentoring and Coaching Council (EMCC).
- International Association for Coaches (IACC).
- Worldwide Association of Business Coaches (WABC).

A total of 1,254 respondents indicated membership of these other international associations. Country-specific, regional and various other memberships were indicated by 2,503 respondents.

A total of 2,172 overlapping memberships were indicated by survey respondents. In addition, 1,563 said they were not in any association, with a further 1,255 not stating their membership status.

Memberships: Valid survey returns



Modified membership ratio method

The membership responses from the 2011 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 (18,660), it would seem that ICF memberships should serve as the reference group. However, the survey sample is heavily skewed towards ICF members (64% of the valid responses).

This naturally reflects the use of the ICF member dataset 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/regional/other memberships, no memberships and membership not stated.

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The number of coaches

The combined membership of other international associations is estimated at 8,700. 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 9,000. The importance of the overlap adjustment in moving from total memberships to the estimated number of coaches is readily apparent, as one in five coaches are estimated to belong to more than one association.

When the membership sub-groups are added together, and after subtracting the overlaps, it is estimated that there are presently in the region of 47,500 professional coaches worldwide.

Estimated coaches worldwide, by memberships

	Grossed-up	Survey	
Memberships:	*Coaches*	*%*	*%*
ICF	18,600	39	64
Other International organizations	8,700	18	10
Country/other organizations	13,700	29	21
None/not stated	15,500	33	23
Overlap adjustment	-9,000	-19	-18
Total coaches	47,500	100	100

Technical Appendix

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 almost 19,000 members estimated to account for 39% of the global total.
- The large scale of the *2012 ICF Global Coaching Study*, including especially over 4,400 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 47,500 would seem to be a reasonable estimate for the worldwide number of coaches. 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.
- 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 were drawn from 65 countries. Similarly, survey returns from those with country/regional/other associations came from 75 countries. For those with no membership affiliation, 84 countries were represented and for membership not stated, returns were generated from 79 countries.
- 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 at a point in time.

Technical Appendix

Quantitative indicators

The *2012 ICF Global Coaching Study* sought information on four quantitative indicators (e.g. revenues, fees per 1 hour session, hours worked per week as a coach, and clients currently coaching). Information on these indicators was sought from active coaches 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 the questions relating to financial information. However, over eight in 10 active coaches supplied the requisite information. 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. 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 coaches only)

	Responses	
	Coaches	*% of active coaches*
Annual revenue/income from coaching	8,672	82.3
Average fee for 1 hour coaching session	9,121	86.6
Active clients	10,461	99.3
Hours per week working as a coach	10,503	99.7
Active coaches	10,534	100.0

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Secondary data sources

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

- Total population.
- Exchange rates for converting revenues and fees to U.S. dollars.
- Purchasing power parity (PPP) conversion factor, defined by the World Bank as “the number of units of a country'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 December 2011. Data were extracted at country level and aggregated to the world regional groupings outlined above.

As at December 2011, World Bank data were available on the foregoing indicators for the majority of countries through 2010. Where data for a country was not available through 2010, the World Bank data for 2009 were updated using the relevant indicators from the International Monetary Fund (IMF) September 2011 World Economic Outlook (WEO) database (available at http://www.imf.org/external/data.htm).

Taiwan is not separately listed on the World Bank datasets. Hence, the IMF dataset was used as the data source for Taiwan.

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Comparability

The following points should be noted in drawing comparisons between the 2012 and 2007 study findings.

Questionnaire design.
The 2011 questionnaire differs from its predecessor in a number of respects. Compared to the 2006 survey, the 2011 questionnaire addresses a number of additional topics (e.g. the attributes that coaches consider may be important to a client).

Selected topics included in the 2006 questionnaire were significantly extended in the 2011 questionnaire (e.g. membership of coaching associations and certification/ credentials). In order to keep the 2011 questionnaire to a manageable length, some questions were also not carried forward from the 2006 survey (e.g. whether the coach considers her/himself to be full-time or part-time).

These changes limit the comparability of the two surveys. Where comparisons between the 2007 and 2012 studies are possible, these are highlighted in the main body of the report.

The number of coaches.
In the report on the *2007 ICF Global Coaching Study*, the estimate for the number of coaches (30,000) was derived as a <u>minimum</u> estimate based on the number of coaches contacted to take part in the survey.

For the *2012 ICF Global Coaching Study*, the number of coaches has been modeled by combining survey and other data to derive a <u>reasonable</u> estimate for the number of professional coaches as of November 2011.

Global revenue. Total global revenue from coaching in the *2007 ICF Global Coaching Study* report was obtained by multiplying the number of coaches by reported average revenue.

In the *2012 ICF Global Coaching Study* update, only coaches with currently active clients were asked about their revenue figures. Hence, the average revenue figures have been applied to the estimated number of active coaches (87% of all coaches) as of November 2011.

Country mix effects. The *2012 ICF Global Coaching Study* attracted respondents from 117 countries. This compares with 73 countries participating in the *2007 ICF Global Coaching Study*. Hence, the mix of countries varies between the two surveys.

For example, in the *2007 ICF Global Coaching Study*, 60% of respondents were from North America, compared with 41% in the *2012 ICF Global Coaching Study*.

The different mix of countries in the *2012 ICF Global Coaching Study* means that due caution should be exercised in drawing comparisons with the averages for annual revenues, fees, hours and clients as of December 2006.

www.coachfederation.org/coachingstudy2012