

International Coach Federation Global Coaching Study

Executive Summary

February 2007



Introduction

Survey Background

In 2006, the International Coach Federation (ICF) identified the need to commission a truly global survey of the coaching profession. As a fast growing industry, there was a sense that whilst some important research studies have undoubtedly taken place, there was currently no definitive global base-line of what the profession looked like, what coaches saw as the major challenges facing the industry going forward and what, in revenue terms, was the size of the industry.

The ICF commissioned PricewaterhouseCoopers' International Survey Unit (ISU) to undertake the global survey. One of the key challenges for the research was to ensure that the survey reached beyond solely ICF members to embrace the wider coaching community.

The ICF Global Coaching Study was launched on September 22, 2006, with close to 30,000 coaches invited to participate. When the survey closed on December 5, 2006, 5,415 respondents from 73 countries had participated, thus providing the ICF with a global perspective on the coaching profession. Importantly, more than 1,500 non-ICF members had taken part.

Survey Objectives

At the outset, the survey objectives were established:

- 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 i.e. who uses coaches (overall and by type of coach), and the reasons given for hiring coaches; and
- To identify future trends in the industry and assess attitudes towards a range of challenges facing the industry.

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Methodology

The survey was implemented via an e-survey methodology. As most of the ICF's communication with members is undertaken by e-mail, the membership database provided access to accurate and comprehensive contact details.

As the survey also had an overarching objective of reaching beyond the ICF, non-members were encouraged to register their interest on a Registration Site that was independently hosted by PricewaterhouseCoopers. This undoubtedly assisted with the response rate to the survey. ICF members encouraged other coaches that they knew to participate, and other coaching organisations publicised the ICF survey on their Web sites.

The e-survey was administered in English. However, a fundamental aim of the survey was to be as inclusive as possible and to provide the maximum opportunity for as many coaches as possible to participate. In order to help achieve this objective, the survey was also made available in a downloadable PDF format in Chinese, French, German, Japanese, Russian and Spanish.

Interpretation of the results

When interpreting the results from this survey, it is important to keep in mind that there are some limitations to take into consideration. These are as follows:

- The number of coaches currently operating globally is still very much a source of debate. As part of the research for this study, a genuine attempt was made to circulate the survey to some 30,000 coaches for whom there appeared to be valid e-mail addresses. This included both the full ICF membership and all those who had registered independently via the survey registration Web site. Whilst the figure of 50,000 coaches worldwide has often been quoted, a more prudent approach for the purposes of grossing up any estimates would be to take the 30,000 figure as at least a working base-line. Certainly there does not appear to be any significant industry voices arguing that there are less than 30,000 coaches currently operating.
- Certain important industry averages and estimates e.g. revenue, length of time in the industry, etc, as well as other data are based on the survey responses and are only as accurate as the data provided by the individual survey respondents.

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Profile of Respondents

Half of all survey respondents were from the US (50.6%) reflecting the importance of this market in the development of the industry overall. The survey provided strong supporting evidence for the view that the industry is a truly global profession. Responses were received from 73 countries worldwide.

Chart 1 : Country participation

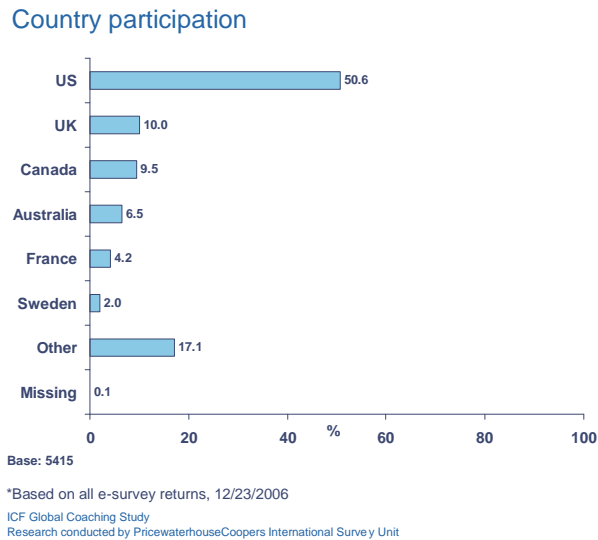
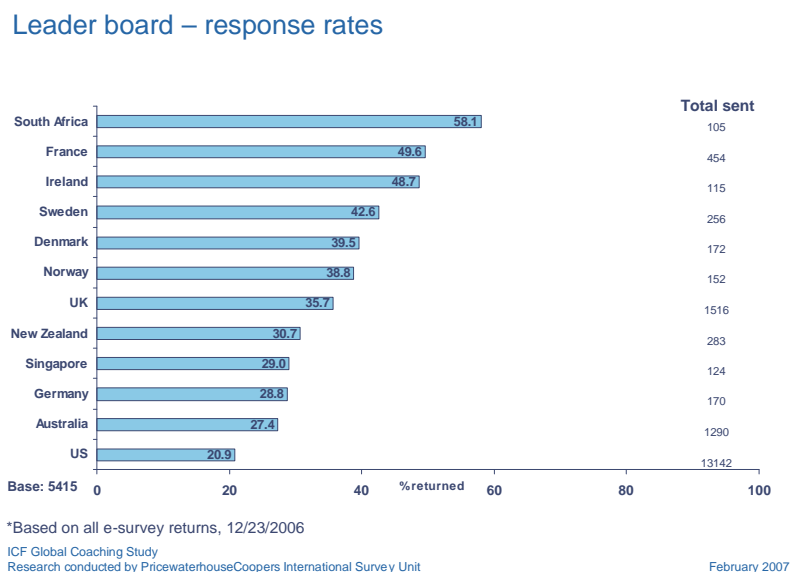


Chart 2 highlights some of the response rates which were achieved in individual countries. With more than 45% of all those that were invited to participate in the survey responding, South Africa, France and Ireland are at the head of the leader board.

Chart 2 : Leader Board



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Profile of the Coaching Industry

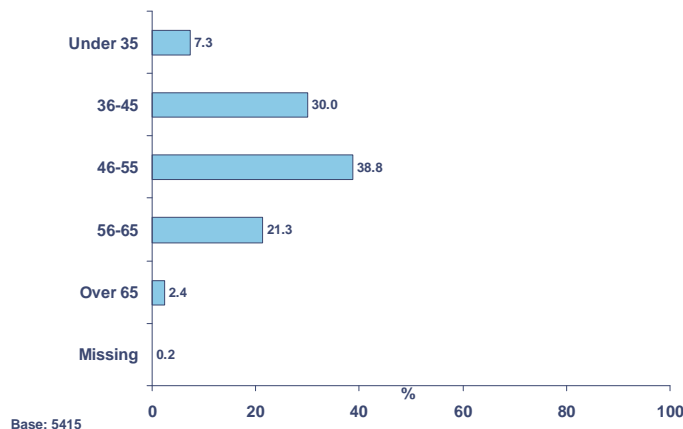
Coaching is currently a predominantly female profession. Globally over two thirds of all survey respondents were female (68.7%), rising to almost three quarters in the North American region.

The survey results indicate that 39.2% of respondents are full-time coaches. Looking specifically at the gender profile of full-time coaches, it largely mirrors that of the industry: 63.3% female, 36.5% male.

In terms of age, just 7.3% of respondents were less than 35 years old, with the biggest cluster of respondents aged between 46 and 55 (38.8%). As coaching is a relatively new profession, it is unsurprising that despite the mature age profile of respondents, the vast majority have been coaching for less than 10 years (86.4%).

Chart 3: Age profile

Age profile



Base: 5415

*Based on all e-survey returns, 12/23/2006

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Client Profile

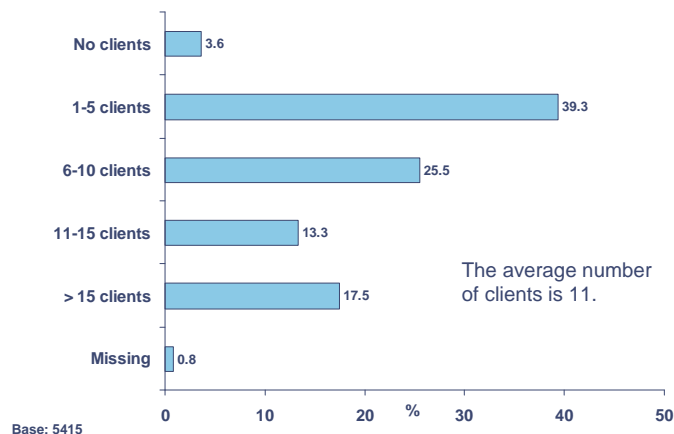
Mirroring the known composition of the coaching industry, the majority of active clients were also female (56.5%).

Looking specifically at female respondents to the survey, 63.6% of their active clients were female; for male respondents, 59.4% of their active clients were male.

According to the coaches that responded to the survey, the greatest percentage currently coached between 1 and 5 clients (39.3%). Obviously, there are exceptions, with those that coach other coaches having a much greater number of active clients. On average, respondents coached 11 clients.

Chart 4: Number of active clients

The average number of current active clients



Base: 5415
*Based on all e-survey returns, 12/23/2006

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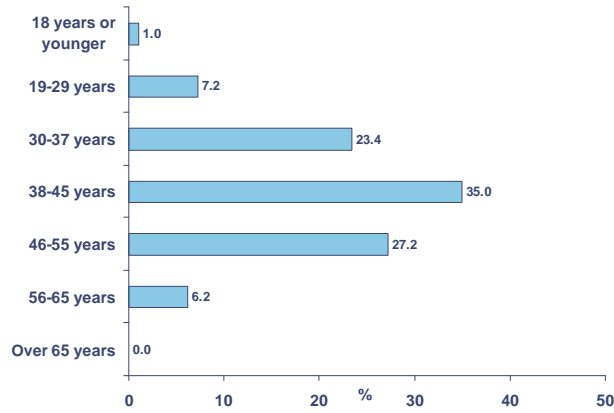
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Over one third (35.0%) of all respondents stated that their active clients were aged between 38 and 45 years, with a further quarter (27.2%) having clients aged between 46 and 55 years.

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Chart 5: Age profile of active clients

Age profile of active clients



Base: 5116 (Those currently with active clients that supplied % split)

*Based on all e-survey returns, 12/23/2006

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Revenue

There has been much debate about the salaries that coaches can expect to earn, and the amount that should be charged for hourly sessions. While the survey sought to capture this information, it should be remembered that the ICF and PricewaterhouseCoopers can only report the information provided by survey respondents. The accuracy of the revenue information is entirely dependent on the individual survey respondents supplying reliable information.

In this section of the survey, whilst respondents answered in their own local currency, in order to standardize comparison, all figures are quoted in US dollars.

Assuming as a prudent threshold, that there are 30,000 coaches worldwide, it is possible to estimate that the revenue generated by the coaching industry globally is close to \$1.5 billion. The United States market accounts for approximately half of all global revenues.

Respondents were extremely positive about future revenues, with 4 out of 5 respondents (81.0%) expecting revenue to increase in the next 12 months. Only 1.5% expected a decrease.

In terms of survey respondent's annual revenue generated by coaching alone, the survey results indicated an average salary of \$50,510, based on the 4,450 respondents for whom valid data was provided. When split by full-time and part-time coaching, the annual figures were \$82,671 and \$26,150 respectively.

Next Steps

This is only the beginning of the information available to the coaching profession through this comprehensive study. Additional modules are being written by PricewaterhouseCoopers that will highlight the various areas of the study. These modules will be available for purchase. See below for the specific module names and when they will be released.

- *Module 1: Profile of Coaching Industry* will be released on March 30, 2007. This module will include detailed information on coaching demographics, differences between ICF credentialed and non-credentialed coaches, coaching specialties, methods of coaching, regional/country-specific information, overall revenue, training/education information, money spent on professional development, listings of top professional organizations coaches belong to, and ICF member and non-member differences.
- *Module 2: Revenue* will be released on May 1, 2007. This module will include revenue information compared with level of education, ICF member and non-member differences, overall earnings, earnings by specialty, full/part-time earnings, revenue differences by region/country, pro bono/barter offered, ICF credential and non-credentialed differences, industry revenue expectations, revenue differences by methods of coaching (phone/in-person, etc.), revenue differences compared to money spent on training/development, and compared to coach training and level of education received.
- *Module 3: Client Profile* will be released on July 1, 2007. This is client information gathered from coaches who participated in the study. This will include client demographic information, client demographic information for country/regions, any client differences by coaching category, client data from ICF credentialed and non-credentialed coaches, methods of coaching used with clients, client differences between ICF members and non-members, and client-specific sections of the industry trends.
- *Module 4: Industry Issues and Trends* will be released on September 1, 2007. This module will include information gathered on current issues and trends relating to the coaching profession and will note any differences in thought among the following groups: ICF member and non-member, ICF credentialed and non-credentialed, and region/country-specific issues.
- *Final Report* will be released on September 15, 2007. The full report will include all of the above, along with an ending section written by PricewaterhouseCoopers on any overall wrap-up conclusions, including greatest opportunities and challenges for coaches going forward.

If you have any questions regarding the study or would like to order one of the modules, please e-mail your request to icfheadquarters@coachfederation.org, or call +1.859.219.3580.

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The International Coach Federation is the leading global organization for coaches, with over 11,000 members in 80 countries, dedicated to advancing the coaching profession by setting high standards, providing independent certification, and building a worldwide network of credentialed coaches. For more information on how to become or find an ICF credentialed coach, please visit our Web site at www.coachfederation.org.

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