***2016 ICF Global Coaching Study***

**Speaking points**

The speaking points provided below will assist you in answering key questions we anticipate being asked regarding the *2016 ICF Global Coaching Study*. In addition to the answers provided below, please refer everyone you speak with to the *2016 ICF Global Coaching Study* landing page at [Coachfederation.org/2016study](http://coachfederation.org/2016study).

**ABOUT THE STUDY:**

**Why conduct the *2016 ICF Global Coaching Study*?**

In accordance with our strategic plan, ICF is assuming a thought-leadership role for the evolution of global coaching. To this end, we invest in industry research in order to fully understand the state of the coaching profession and the factors that impact it. ICF research provides coach practitioners with the knowledge they need to make wise business decisions. It also builds a platform for advocacy to spread awareness of how people can unlock their potential through coaching.

ICF chose PricewaterhouseCoopers LLP as our research partner for this study. This marks the third iteration of the *Global Coaching Study* and seventh industry research project ICF has completed with PwC since 2006.

The study was designed to engage with as many coach practitioners as possible to provide an up-to-date picture of the coaching profession and empower coaches to embrace the opportunities and meet the challenges ahead. The study was also designed to recognize the growth of coaching cultures within businesses and organizations. For this reason, it was widened in scope to include managers and leaders who use coaching skills within their organizations.

**The Survey Process:**

* One of the guiding principles for the study was that it remained globally inclusive. For this reason, the survey was delivered electronically in nine different languages:
  + English
  + French
  + German
  + Italian
  + Japanese
  + Korean
  + Mandarin
  + Portuguese
  + Spanish
* The survey had a six-month fieldwork period, beginning in July 2015.
* ICF and PwC implemented a number of tactics to engage worldwide with coach practitioners and managers/leaders using coaching skills, including:
  + Sending personalized email invitations and survey links to current ICF Members and Credential-holders, individuals with expired ICF Memberships, past *Global Coaching Survey* participants, and business leads obtained through ICF’s strategic alliances with business and professional organizations
  + Inviting ICF Members to forward a generic link to their professional network to initiate a “snowball” effect
  + An email and social media campaign
  + Promotions at local, regional and global ICF events
* The survey was designed to be completed using a range of mobile devices.
* Several other professional coaching bodies also delivered messages directly to their own members inviting them to complete the survey, including:
  + Association for Coaching (AC)
  + Association of Coach Training Organizations (ACTO)
  + European Mentoring and Coaching Council (EMCC)
  + Graduate School Alliance for Executive Coaching (GSAEC)
  + International Association of Coaching (IAC)
  + World Business and Executive Coaches Summit (WBECS)

**Survey outcomes:**

* 15,380 valid responses were obtained.
* Responses came from 137 countries
* Forth countries achieved 100-plus survey responses each. Also crossing this threshold were:
  + 18 U.S. states
  + Four Canadian provinces
  + Two regions in the United Kingdom
  + Three Australian territories
* In total, 5,867 valid responses were submitted by non-ICF Members, representing 38% of the total number of completed surveys.

**Updated survey design:**

* The questionnaire is very similar to the instrument employed for the *2012 ICF Global Coaching Study*, facilitating comparisons across a range of topics.
* The most significant change was to the screening question at the beginning of the questionnaire:
  + For the 2012 study, respondents were screened in if they answered yes to the following: “Are you a professional coach?”
  + PwC adopted a two-stage approach for the 2016 study to obtain information on managers/leaders using coaching skills:
    - Respondents were first asked if they considered themselves to be a professional coach.
    - In a follow-up question, respondents were asked to select which of the following best describes what they primarily do:
      * External coach practitioner
      * Internal coach practitioner
      * Both an external coach practitioner and an internal coach practitioner
      * No longer coaching at this time and do not plan to coach in the future
      * A human resources/talent development manager/director who uses coaching skills
      * A manager/leader who uses coaching skills
      * None of the above
* The second screening question classified respondents into two broad categories (coach practitioners and managers/leaders using coaching skills) along the “coaching continuum”
  + The term “coaching continuum” accounts for a wider range of modalities in which coaching approaches and competencies may be applied.
  + On one side of the continuum are managers and leaders who apply coaching skills and approaches in the workplace.
  + On the other end of the continuum are trained, professional coach practitioners, most of whom derive or have derived a portion of their annual income from their work as an internal and/or external coach.

**ABOUT THE DATA:**

**Three Key Statistics from the *2016 ICF Global Coaching Study*:**

* Total number of coaches worldwide: approximately 53,300 professional coach practitioners
* Total revenue generated worldwide from coaching in 2015 was $2.356 billion USD, representing a 19% increase over the 2011 estimate published in the *2012 ICF Global Coaching Study*.
* The annual average revenue generated by coaching is $51,000 USD.

**Additional Facts:**

* The profession appears to be growing, with an **estimated 53,300 professional coaches** generating approximately **$2.356 billion USD in annual revenue/income**.
* The typical coach who participated in this study is **earning an average of $51,000 USD** in revenue per year from coaching. It should be noted that these average revenues reflect all of the diversity that is known to exist within the coaching profession, such as coaching experience, education, and training.
* **Western Europe accounts for the largest share of coach practitioners** (35%), followed closely by North America with an estimated 33% share.
* Among coach practitioners, **more than three-quarters (79%) self-identified as external coach practitioners**, 6% said they were internal coach practitioners and 15% said they work as both external and internal coach practitioners.
* Study participants noted that they many **supplement their earnings by offering other services** within their professional practice, namely consulting (62%) and training (61%).
* When asked about their **current level of coaching activity**, 90% of coach practitioners responding to the survey indicated they had active clients at that time. This distinction was important because only active coaches were allowed to provide statistics on their annual revenues, fees per 1 hour session, hours worked, and number of clients.

* The **proportion of coach practitioners with active clients** was highest in the established regions of North America (92%), Oceania (91%) and Western Europe (91%).
* All active coach practitioners were asked to quote their **average fee for a 1 hour coaching session**. As expected, several disparities emerged across global regions and varied according to things like coaching experience and client type (e.g., executives as opposed to personal clients). All factors considered, the global average fee for a 1 hour coaching session was $231 USD.
* The study also determined that an active coach practitioner maintained an **average of 11 clients** at any given time. Again, some clear variations were detected across regional patterns and were influenced by the reported level of coaching experience.
* In terms of age, coach practitioners who responded to the survey are **almost equally split** between those under age 50 (46%) and those age 50 and over (54%).
* Coach practitioners worldwide predominantly **view coaching as a profession** (70%). A majority of managers/leaders using coaching (57%) skills **view coaching as a skill-set**.
* **Key issues** for the future include the question of whether coaching should be regulated; tackling obstacles such as untrained individuals who call themselves coaches; and, availing of opportunities to increase awareness of the benefits of coaching.
* The vast majority of coach practitioners (77%) agree that the **marketplace expects them to have a certification/credential.** The extent of agreement expressed by respondents to the 2015 survey mirrors the position in 2011.
* A slight majority of coaches (52%) **believed that coaching should become regulated**, while 22% of coach practitioners disagreed. The remaining coaches (26%) indicated that they were still unsure on the subject of regulation.
* Among those who believe coaching should be regulated, or who claimed to be unsure, the overwhelming majority (84%) of them said that **professional coaching associations were best placed to handle this responsibility.**
* Looking at the subject of **regulation across the global regions**, it appears that the proportion of coaches who favored regulation was significantly lower in North America. Among coach practitioners in North America, respondents were almost evenly divided among those favoring regulation (37%), disagreeing (32%) and unsure (31%).
* When looking at the **biggest obstacle for coaching**, the main concern expressed by coach practitioners was untrained individuals who call themselves coaches (44%), followed by marketplace confusion about the benefits of coaching (28%).
* The **main opportunities for coaching** were identified by coach practitioners as an increased awareness of the benefits of coaching (38%) and the emergence of credible data on the ROI/ROE from coaching (26%).
* Coaching remains a **female-dominated profession**. Regionally, the female share of coach practitioners is highest in North America and lower in emerging markets.
* This study shows a **continued increase in the level of education** among those across the coaching continuum. In 2015, 63% of respondents said they had been educated to the third level (i.e., master’s or doctoral level), an increase of three percentage points from 2011 (60%), and 10 percentage points higher than in 2006 (53%). There is very little difference in education levels between coach practitioners and managers/leaders using coaching skills.
* Coaches are **becoming even more experienced**, reflecting the growing maturity of the profession. In 2015, more than one in four coach practitioners said they had 10 or more years of coaching experience. By comparison, 19% of respondents reported 10 or more years of coaching experience in 2011, and 14% reported 10-plus years of experience in 2006.
* Almost all coach practitioners who have responded to the survey (99%) have received some form of **coach-specific training**, with 81% receiving training through a program that was accredited or approved by a professional coaching organization. The receipt of coach-specific training was also very high among managers/leaders using coaching skills, with 93% reporting that they had received training, and almost three-quarters (73%) saying they had received training through an accredited or approved provider.
* Among coach practitioners who had received coach-specific training, 42% said they have undertaken 200 or more **hours of training**. Collectively, more than two in three practitioners (68%) have completed 125 hours or more of coach-specific training. Not unexpectedly, fewer managers/leaders said they had received 125 hours or more of training (42%). Nonetheless, almost one in four (23%) had received 200 or more hours of training.
* More than half of coach practitioners (51%) believe to a large extent that coaching is able to **influence social change**. A further 33% hold that belief to a moderate extent.