Study Details and Key Findings

Middle East and Africa

2016 ICF Global Coaching Study
The Project
Goals

• Build on earlier industry research efforts (2012 and 2007)
• Determine the size and scope of the coaching profession
• Collect insights from growing population of managers/leaders using coaching skills
Survey Process

• Six-month survey period beginning in July 2015
• Available in nine languages
• Designed to be completed using a range of mobile devices
• Promoted through an intensive email and social media campaign
Survey Outcomes

• 15,380 valid survey responses
• 137 countries
• 40 countries with 100-plus survey responses each
The Coaching Continuum

• 2012 study classified coaches based on self-identification as a professional coach (Y/N)
• Coaching continuum accounts for a wider range of modalities in which coaching approaches and competencies may be applied
  – One end: Managers/leaders who apply coaching skills and approaches in the workplace
  – Other end: Trained, professional coach practitioners
Age and Gender

To which of these age groups and genders do you belong?

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Gender Male</th>
<th>Gender Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>25 years and under</td>
<td>0.9%</td>
<td>0.5%</td>
</tr>
<tr>
<td>26 to 30 years</td>
<td>3.0%</td>
<td>2.3%</td>
</tr>
<tr>
<td>31 to 34 years</td>
<td>4.6%</td>
<td>5.2%</td>
</tr>
<tr>
<td>35 to 39 years</td>
<td>10.2%</td>
<td>13.6%</td>
</tr>
<tr>
<td>40 to 44 years</td>
<td>14.2%</td>
<td>20.7%</td>
</tr>
<tr>
<td>45 to 49 years</td>
<td>17.2%</td>
<td>17.3%</td>
</tr>
<tr>
<td>50 to 54 years</td>
<td>18.0%</td>
<td>18.5%</td>
</tr>
<tr>
<td>55 to 58 years</td>
<td>10.7%</td>
<td>15.1%</td>
</tr>
<tr>
<td>60 to 64 years</td>
<td>3.0%</td>
<td>10.4%</td>
</tr>
<tr>
<td>65 years and over</td>
<td>2.7%</td>
<td>6.9%</td>
</tr>
</tbody>
</table>

Respondent Base: 811

2016 ICF Global Coaching Study
Formal Education

What is the highest level of formal education that you have?

- Primary Level (education prior to university): 8.0%
- Secondary Level (bachelor's degree): 29.6%
- Third Level (master's, doctoral degree): 63.4%

Respondent Base: 811

2016 ICF Global Coaching Study
Years of Coaching Experience

How long have you been coaching?

- Less than 1 year: 11.1%
- 1 to 2 years: 14.9%
- 3 to 4 years: 20.9%
- 5 to 10 years: 31.4%
- More than 10 years: 26.8%

Respondent Base: 640

2016 ICF Global Coaching Study
Coaching Specialty

Please indicate which of the following coaching areas you regard as your main area of coaching.

- Business/Organizations: 20.4%
- Leadership: 25.1%
- Life Vision & Enhancement: 17.7%
- Executive: 17.6%
- Career: 14.9%
- Relationships (Singles, Couples, Families): 3.9%
- Small business: 3.3%
- Children/Teens: 3.6%
- Health and Wellness: 3.3%
- Spirituality: 1.1%
- Cross-cultural: 0.7%
- Retirement: 0.3%
- Addiction and Recovery: 0.2%
- Other (please specify): 5.5%
- No specialty: 3.8%

Respondent Base: 638

2016 ICF Global Coaching Study
View of Coaching

"I view coaching as..."

- 84.6% view it as a profession
- 30.6% view it as a skill-set
- 4.8% view it as an industry

Respondent Base: 811

2016 ICF Global Coaching Study
Importance of the Credential

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

- Strongly agree: 53.8%
- Somewhat agree: 38.5%
- Neither agree nor disagree: 13.2%
- Somewhat disagree: 7.9%
- Strongly disagree: 2.7%

Respondent Base: 811
Main Findings

Size of the Profession
## Key Statistics – Global

### Total Revenue (US$)

- **Global**: $2.35 Billion

### Memberships

- **ICF**: 63%
- **Other**: 23%
- **None**: 25%

### Credentials

- **ICF**: 48%
- **Other**: 26%
- **None**: 33%

### Coach Practitioners

- 53,300

### Managers/Leaders using Coaching Skills

- 10,900

### All Coaching Modalities

- 64,100

### Average Annual Revenue (US$)

- $51,000

### Average Fee per 1 Hour Coaching Session (US$)

- $231

### Average Number of Active Clients

- 11.0

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2016 ICF Global Coaching Study
# Key Statistics – Middle East and Africa

**Middle East & Africa**

<table>
<thead>
<tr>
<th>Total revenue (US$)</th>
<th>$73 Million</th>
</tr>
</thead>
</table>

**Memberships**

- ICF: 62%
- Other: 35%
- None: 22%

**Coach practitioners**

- 2,400

**Managers/Leaders using coaching skills**

- 3,100 All coaching modalities
- 700

**Average annual revenue (US$)**

- $35,900

**Average fee per 1 hour coaching session (US$)**

- $143

**Average number of active clients**

- 11.2

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*Estimates are shown to the nearest 100. Therefore subtotals may not add up to the total figures.*

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2016 ICF Global Coaching Study
Main Findings

Key Issues and Future Trends

2016 ICF Global Coaching Study
View on Regulation

Should coaching become regulated?

Global data
ON
OFF

- Yes: 73.7%
- Unsure: 16.7%
- No: 9.6%

Global Benchmark
- Yes: 52.3%
- Unsure: 25.4%
- No: 22.3%

Respondent Base: 749
Method of Regulation

Who would be best to regulate the coaching industry?

- Government entities:
  - Unsure: 16.2%
  - Yes: 71.3%
  - Unsure: 26.6%

- Professional coaching associations:
  - Unsure: 16.2%
  - Yes: 58.7%

Respondent Base: 677

2016 ICF Global Coaching Study
Obstacles for the Profession

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

- Untrained individuals called coaches: 44.3%
- Marketplace confusion re: coaching benefits: 28.5%
- Coaching market saturation: 20.9%
- Coaches under-pricing their services: 9.8%
- Over-regulation of coaching: 8.0%
- Increased demand for competing services: 4.0%
- Other: 4.4%

Respondent Base: 749
Opportunities for the Profession

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

- Increased awareness-Benefits of coaching: 40.8% (ON) vs 37.8% (OFF)
- Credible data - ROI/ROE from coaching: 26.2% (ON) vs 27.2% (OFF)
- Improved general perception of coaching: 13.8% (ON) vs 14.3% (OFF)
- Increased demand for coaching: 11.4% (ON) vs 11.4% (OFF)
- Positive portrayal of coaching in media: 5.8% (ON) vs 6.6% (OFF)
- Other: 2.3% (ON) vs 2.9% (OFF)

Respondent Base: 748

2016 ICF Global Coaching Study
Final Report

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