Study Details and Key Findings

Western Europe
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
Main Findings

The Coaching Continuum
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?

- **25 years and under**: 0.2% (0.5%)
- **26 to 30 years**: 1.1% (2.3%)
- **31 to 34 years**: 3.0% (4.6%)
- **35 to 39 years**: 9.2% (10.2%)
- **40 to 44 years**: 15.0% (14.2%)
- **45 to 49 years**: 20.5% (17.2%)
- **50 to 54 years**: 21.0% (18.5%)
- **55 to 59 years**: 18.2% (15.1%)
- **60 to 64 years**: 8.3% (10.4%)
- **65 years and over**: 3.9% (6.9%)

Respondent Base: 3517

2016 ICF Global Coaching Study
Formal Education

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

- Primary Level (education prior to university): 9.2%
- Secondary Level (bachelor's degree): 27.0%
- Third Level (master's, doctoral degree): 63.8%

Respondent Base: 3517

ICF Global Coaching Study
Years of Coaching Experience

How long have you been coaching?

<table>
<thead>
<tr>
<th>Experience</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 1 year</td>
<td>8.3%</td>
</tr>
<tr>
<td>1 to 2 years</td>
<td>12.3%</td>
</tr>
<tr>
<td>3 to 4 years</td>
<td>19.1%</td>
</tr>
<tr>
<td>5 to 10 years</td>
<td>32.6%</td>
</tr>
<tr>
<td>More than 10 years</td>
<td>29.7%</td>
</tr>
</tbody>
</table>

Respondent Base: 3106
Coaching Specialty

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

- Business/Organizations: 22.9%
- Executive: 21.0%
- Leadership: 25.1%
- Life Vision & Enhancement: 13.4%
- Career: 6.2%
- Small business: 8.5%
- Health and Wellness: 2.4%
- Cross-cultural: 1.4%
- Children/Teens: 1.0%
- Relationships (Singles, Couples, Families): 2.1%
- Spirituality: 0.7%
- Retirement: 0.3%
- Addiction and Recovery: 0.3%
- Other (please specify): 5.3%
- No specialty: 2.0%

Respondent Base: 3091

2016 ICF Global Coaching Study
"I view coaching as..."

- **... a profession**
  - ON: 64.5%
  - OFF: 84.8%

- **... a skill-set**
  - ON: 32.7%
  - OFF: 30.1%

- **... an industry**
  - ON: 2.8%
  - OFF: 5.0%

Respondent Base: 3517
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/credentialed?

- Strongly agree: 38.5%
- Somewhat agree: 40.7%
- Neither agree nor disagree: 13.2%
- Somewhat disagree: 7.4%
- Strongly disagree: 2.7%

Respondent Base: 3517
Main Findings

Size of the Profession
Key Statistics—Global

Global

Total revenue (US$)

$2.35 Billion

Memberships

ICF 63%
Other 23%
None 25%

Coach practitioners

Managers/Leaders using coaching skills

64,100

All coaching modalities

10,900

Average annual revenue (US$)

$51,000

Average fee per 1 hour coaching session (US$)

$231

Average number of active clients

11.0

Estimates are shown to the nearest 100. Therefore subtotals may not add to the total figures.
Key Statistics—Western Europe

**Western Europe**

- **Total revenue (US$)**
  - $898 Million

- **Estimates**
  - Coach practitioners: 18,800
  - Managers/Leaders using coaching skills: 21,400
  - Average annual revenue (US$): $55,300
  - Average fee per 1 hour coaching session (US$): $288

- **Memberships**
  - ICF: 63%
  - Other: 29%
  - None: 19%

- **Credentials**
  - ICF: 52%
  - Other: 28%
  - None: 27%

- **Average number of active clients**: 10.4

*2016 ICF Global Coaching Study*
Main Findings

Key Issues and Future Trends
View on Regulation

Should coaching become regulated?

- Yes: 59.5%
- Unsure: 24.8%
- No: 16.7%

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

Respondent Base: 3313
Method of Regulation

Who would be best to regulate the coaching industry?

- Yes: 13.0%
- Unsure: 24.4%
- Professional coaching associations: Yes 55.3%, Unsure 25.8%, Other 25.8%

Respondent Base: 2759

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: 41.7%
- Marketplace confusion re: coaching benefits: 27.7%
- Coaching market saturation: 12.5%
- Coaches under-pricing their services: 6.0%
- Over regulation of coaching: 3.4%
- Increased demand for competing services: 3.1%
- Other: 5.7%

Respondent Base: 3308
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%
- Credible data: ROI/ROE from coaching - 26.0%
- Improved general perception of coaching - 14.0%
- Increased demand for coaching - 9.7%
- Positive portrayal of coaching in media - 8.4%
- Other - 3.0%

Respondent Base: 3304
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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