



2020

ICF GLOBAL COACHING STUDY

EXECUTIVE SUMMARY



2020 ICF GLOBAL COACHING STUDY EXECUTIVE SUMMARY

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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.*

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INTRODUCTION

This is a summary of the findings from the *2020 ICF Global Coaching Study*. The study was commissioned in 2019 by the International Coaching Federation (ICF) and undertaken by PricewaterhouseCoopers.

This represents the fourth of ICF's major research projects on the size and scope of the coaching profession. The inaugural study was published in 2007 with follow-up studies in 2012 and 2016.

Over that time, the coaching profession has evolved and grown. As a growing number of individuals and organizations have adopted coaching, the use of coaching skills and approaches has expanded beyond professionally trained coach practitioners to include managers, leaders, and human resources and talent development professionals who apply these competencies in their daily workplace interactions. For that reason, the scope of the 2016 study was widened to include managers and leaders who use coaching skills in the workplace.

The wider, more inclusive scope of the 2016 study was a significant innovation which has been carried through to the 2020 study to provide a fuller picture of the growth of coaching worldwide.

Similar to its predecessors, the 2020 study was designed to engage as many coach practitioners as possible in order to provide an up-to-date picture of the coaching profession and empower professional coaches to meet the challenges that lie ahead. Reflecting the continuing growth of coaching, the survey attracted an unprecedented 22,457 responses from 161 countries and territories.

SURVEY PROCESS

Fieldwork for the 2020 study began in May 2019, when the survey was launched online, and ran through early December 2019. The survey was available in nine languages:

- English
- French
- German
- Italian
- Japanese
- Korean
- Mandarin
- Portuguese
- Spanish

A number of methods were implemented 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, and business leads obtained through ICF's strategic alliances with business and professional organizations, including the Association for Talent Development (ATD), Human Capital Institute (HCI) and Society for Human Resource Management (SHRM)
- Sending email invitations and survey links to individuals who had participated in previous iterations of the study and expressed their willingness to do so again in the future
- Inviting ICF Members to forward a generic link to the online survey registration site to their professional network to initiate a "snowball" effect
- An email and social media campaign encouraging ICF Chapter Leaders worldwide to promote the survey in their communities
- Designing the survey to be completed using a range of mobile devices
- Issuing email reminders to contacts who had not yet completed the survey, and new, monthly emails to coaches who joined ICF after the survey launch
- Promoting the survey with coaches who attended local, regional and global ICF events

Additionally, 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 goes out to the following organizations:

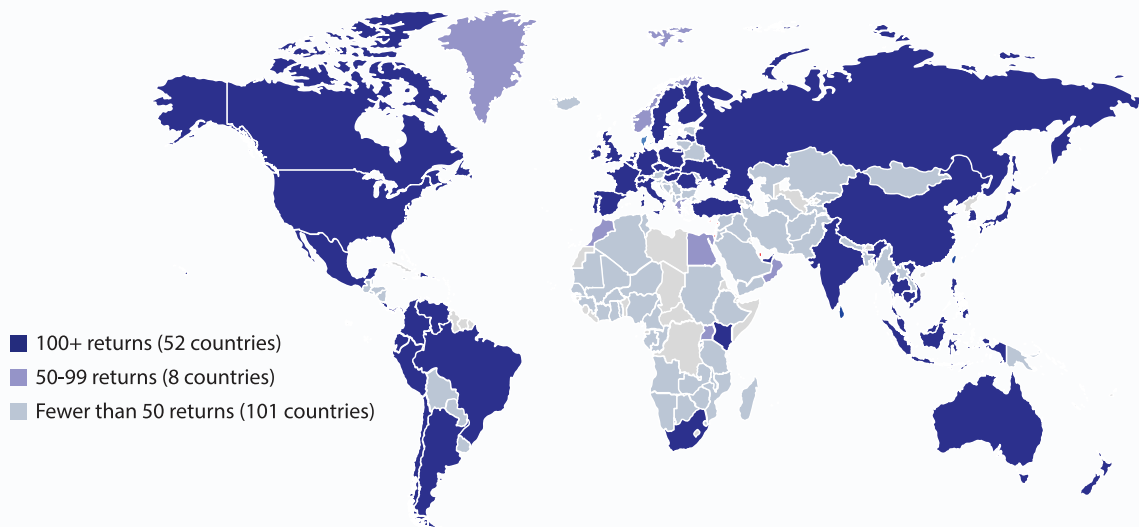
- Association for Coaching (AC)
- Association of Coach Training Organizations (ACTO)
- European Mentoring and Coaching Council (EMCC)
- Graduate School Alliance for Executive Coaching (GSAEC)
- International Association of Coaching (IAC)
- World Business and Executive Coach Summit (WBECS)

SURVEY OUTCOMES

Efforts to maximize participation in the 2020 study proved very successful. With a total of 22,457 valid responses from 161 countries and territories, the study is large in scale and global in reach. (The total number of survey returns represented a 46% uplift on the 2016 study, which attracted 15,380 responses from 137 countries and territories).

More than 100 survey returns were received from 52 countries and territories across all major world regions (up from 40 in the 2016 study).

The global reach of the 2020 ICF Global Coaching Study

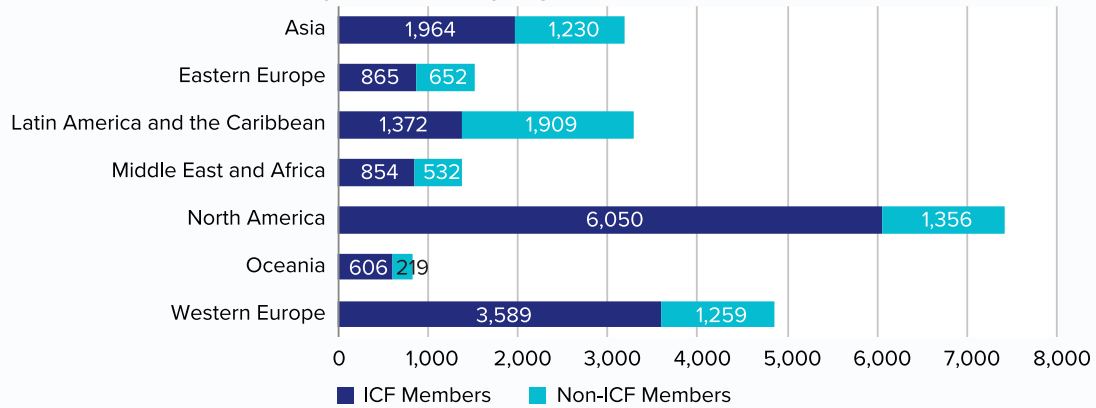


Geographical spread of survey returns for the 2020 ICF Global Coaching Study

| Survey returns | 2020 Countries and Territories | 2016 Countries and Territories | 2012 Countries and Territories |
|----------------|--------------------------------|--------------------------------|--------------------------------|
| 100+ | 52 | 40 | 31 |
| 50-99 | 8 | 8 | 7 |
| Fewer than 50 | 101 | 89 | 79 |
| Total | 161 | 137 | 117 |

The global growth and widening spread of coaching since 2016 is evident from the responses to the 2020 study. The number of responses from Latin America and the Caribbean almost doubled, rising from 1,172 in 2016 to 3,281 in 2020. Asia generated 3,194 responses, an increase of 88% on the 2016 out-turn. Almost 1,400 responses came from the Middle East and Africa, a 71% increase on 2016.

Survey responses by region and ICF membership

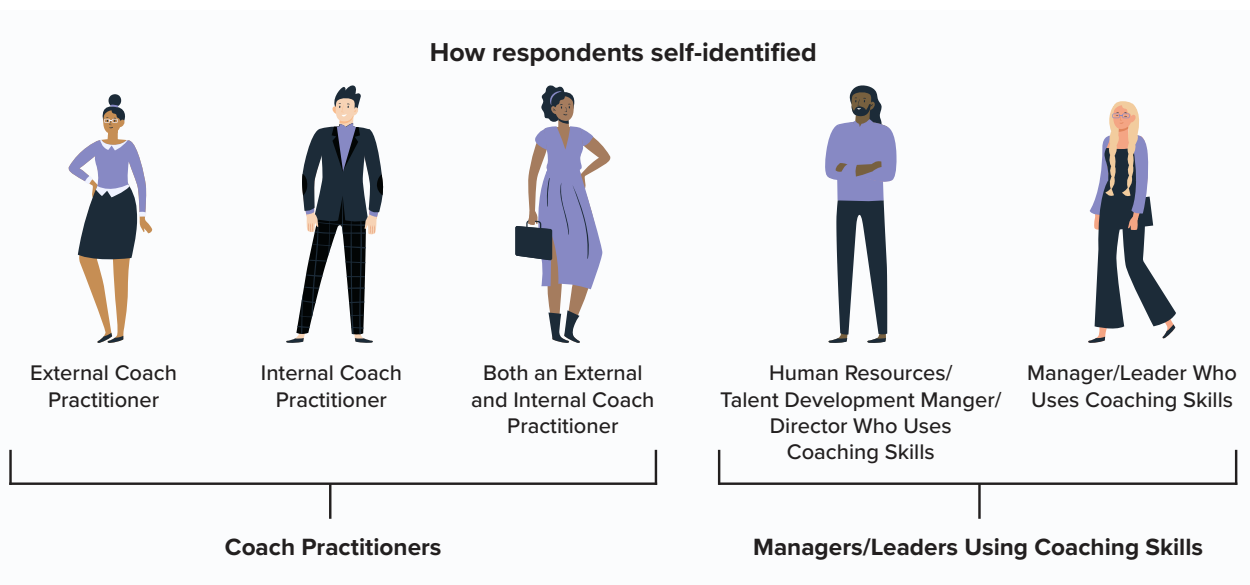


The global growth and widening spread of coaching since 2016 is evident from the responses to the 2020 study.

COACHING CONTINUUM

The “coaching continuum” concept is used in the *ICF Global Coaching Study* to describe the range of modalities in which coaching approaches and competencies may be applied. At one end of the continuum are managers and leaders who apply coaching skills and approaches in the workplace. The type and extent of training that these individuals receive may vary dramatically. On the other end are trained, professional coach practitioners, most of whom receive or have received a portion of their annual income from their work as an internal or external coach.

Although it is possible for an individual to exist at multiple points on the coaching continuum (e.g., someone may use coaching skills and approaches in her role as an organization’s director of HR and operate a part-time business as an external coach practitioner); for the purposes of this study respondents were classified according to the modality they said fit them best.



An accepted, globally inclusive list of individuals in the coaching continuum does not currently exist. As a result, it was 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 to the main report.

Globally, it is estimated that there were approximately **71,000** coach practitioners in 2019, an increase of 33% on the 2015 estimate. Growth was especially strong in the emerging regions of Latin America and the Caribbean (+174%) and Eastern Europe (+40%).

The number of managers/leaders using coaching skills is estimated to have risen by almost half (+46%). This estimate should be viewed as strictly indicative and subject to a higher level of uncertainty than the figures for coach practitioners. However, similar to the coach practitioner estimates, Latin America and the Caribbean recorded the largest growth (+198%). In Asia, the estimated number of managers/leaders using coaching skills more than doubled (+124%).

The coaching continuum: Estimates by world region

| | Coach practitioners | Managers/leaders using coaching skills | All |
|----------------------------------|---------------------|--|---------------|
| Asia | 4,600 | 3,400 | 8,100 |
| Eastern Europe | 6,300 | 2,100 | 8,400 |
| Latin American and the Caribbean | 11,000 | 2,900 | 13,900 |
| Middle East and Africa | 2,800 | 1,300 | 4,100 |
| North America | 23,300 | 3,000 | 26,300 |
| Oceania | 2,600 | 500 | 3,100 |
| Western Europe | 20,400 | 2,800 | 23,100 |
| Global | 71,000 | 15,900 | 86,900 |



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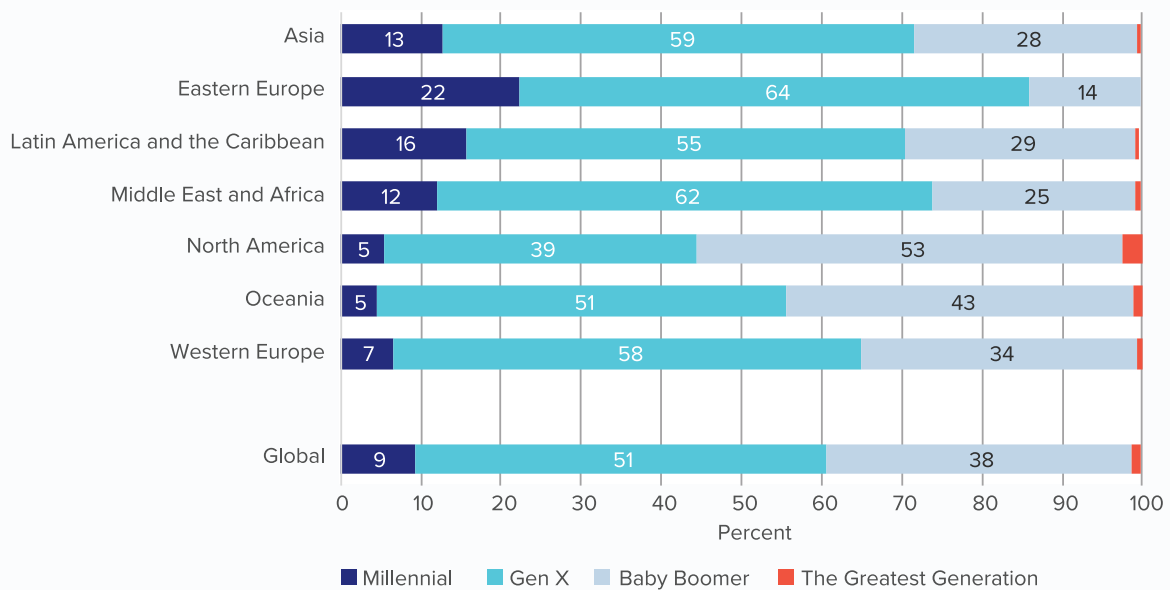
GENERATION

With the exception of North America, the majority of coach practitioners are in the Generation X age cohort. In North America, the majority of coaches are Baby Boomers. Globally, Millennials account for just under one in ten coach practitioners, ranging from 22% in Eastern Europe to 5% in North America. Very few coach practitioners (1%) were part of the Greatest Generation.

Generations by Year

| Generations | Birth Years |
|-----------------------------|------------------|
| Generation Z | 1997-1999 |
| Millennials | 1982-1996 |
| Generation X | 1965-1981 |
| Baby Boomers | 1946-1964 |
| Greatest/Silent Generations | 1945 and earlier |

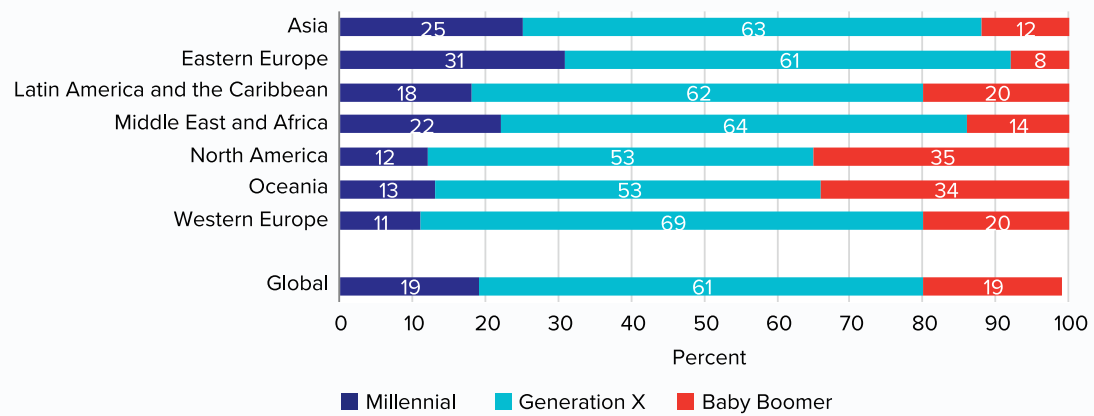
Coach practitioners: Generation by region



From a generational perspective, Generation X accounts for the majority (61%) of managers/leaders using coaching skills. The remainder are equally split between Millennials and Baby Boomers.

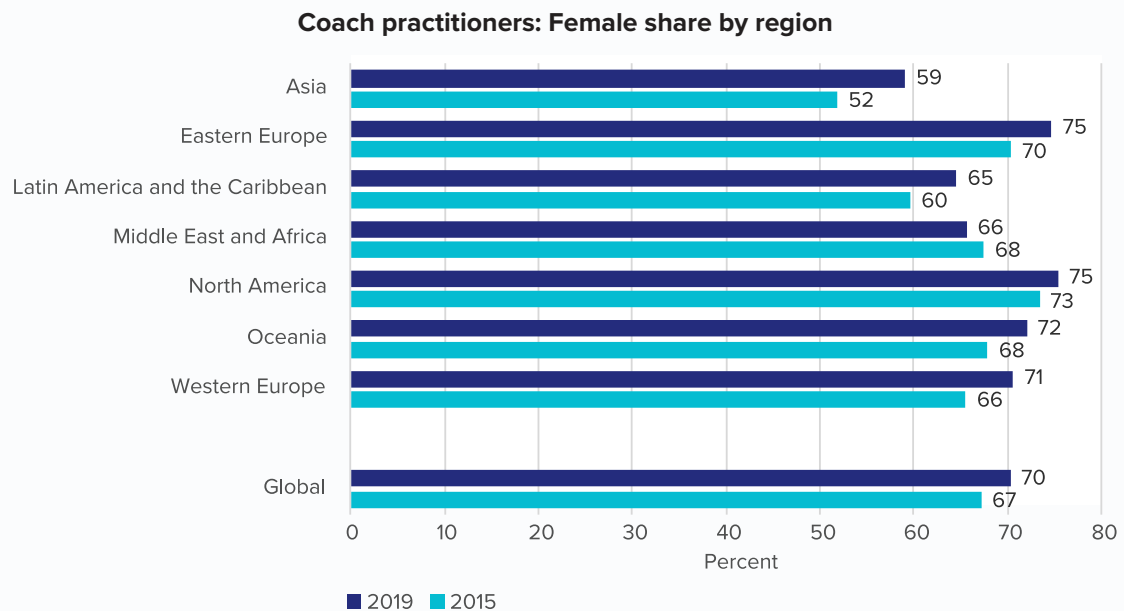
There are distinct regional differences in the distribution across the generational spectrum. Managers/leaders born in the Generation X years are in the majority across all regions, from 53% in North America and Oceania to 69% in Western Europe.

Managers and leaders using coaching skills: Generation by region

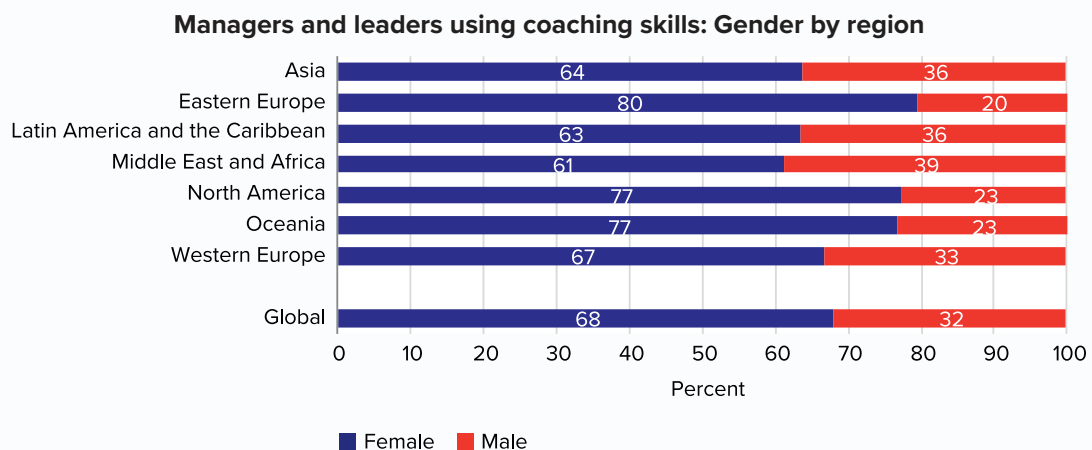


GENDER

Between 2015 and 2019, the female share of coach practitioners rose across all regions except the Middle East and Africa. The largest increase was in Asia, up by seven percentage points from 52% in 2015 to 59% in 2019.



Globally, females account for 68% of managers/leaders using coaching skills, ranging from 61% in the Middle East and Africa to 80% in Eastern Europe.



INCOME AND REVENUE

Coach practitioners with active clients were asked to provide their annual income generated by *coaching only*. Nine in 10 coach practitioners (90%) said they currently have active clients.

Respondents provided annual revenue data in a total of 76 different currencies. In order to provide a common reference point, the revenue figures were converted to U.S. dollars (USD) based on international exchange rates published by the World Bank. When calculated in U.S. dollars, average revenues are highest in the high-income regions of North America, Western Europe and Oceania.

However, it should be appreciated that while revenue data have been provided in one currency, the value of the amounts quoted in individual countries must be contextualized in terms of Purchasing Power Parity (PPP) and diverse standards of living. This subject is explored in greater detail in the Final Report.

Average annual revenue/income from coaching (USD)

| | Average USD |
|----------------------------------|-----------------|
| Asia | \$33,600 |
| Eastern Europe | \$19,100 |
| Latin American and the Caribbean | \$20,900 |
| Middle East and Africa | \$34,900 |
| North America | \$62,500 |
| Oceania | \$61,100 |
| Western Europe | \$51,100 |
| Global | \$47,100 |

Average income from coaching estimates for 2019 can be compared with the 2015 figures published in the *2016 ICF Global Coaching Study*. The comparison in terms of U.S. dollars indicates a reduction of 8% from 2015 to 2019. However, the estimated U.S. dollar change partly reflects currency fluctuations and dollar strengthening over the four-year period. On a PPP basis, average annual revenue/income from coaching rose by 4%.

It should also be noted that the revenue/income measures presented in this report are for coaching only. But 93% of coach practitioners also offer additional services such as consulting, counseling, etc. On average, coach practitioners who offer additional services allocate 44% of their time to coaching. The income that coaches generate from those additional services is not included in the income/revenue.

For each of the seven world regions, total revenue from coaching was derived by combining the regional estimate for active coaches with average annual revenues from coaching. On that basis, the estimated global total revenue from coaching in 2019 was \$2.849 billion U.S. dollars, representing a 21% increase over the 2015 estimate.

Total annual revenue from coaching

| | USD (million) | share of global (%) | % of change 2015-2019 |
|----------------------------------|----------------|---------------------|-----------------------|
| Asia | \$126 | 4.4 | 12% |
| Eastern Europe | \$101 | 3.6 | 45% |
| Latin American and the Caribbean | \$191 | 6.7 | 107% |
| Middle East and Africa | \$80 | 2.8 | 9% |
| North America | \$1,296 | 45.5 | 36% |
| Oceania | \$138 | 4.9 | -10% |
| Western Europe | \$916 | 32.2 | 2% |
| Global | \$2,849 | 100.0 | 21% |

Note: Some respondents, mainly internal coach practitioners, quoted zero annual revenues. They comprised 3.9% of coaches giving an annual revenue figure. The grossed-up results are adjusted for those responses.



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TRAINING AND CREDENTIALING

Similar to its predecessors, the findings from the 2020 study illustrate the high value placed on training and credentialing, both by coach practitioners and managers/leaders using coaching skills.

Training

Nearly all coach practitioners (99%) report that they have completed some coach-specific training. Increasingly, training is through programs accredited/approved by a professional coaching organization (93% in the 2020 study, up from 89% in 2016).

93% of managers/leaders using coaching skills have received some coach-specific training, including 79% through programs accredited/approved by a professional coaching organization.



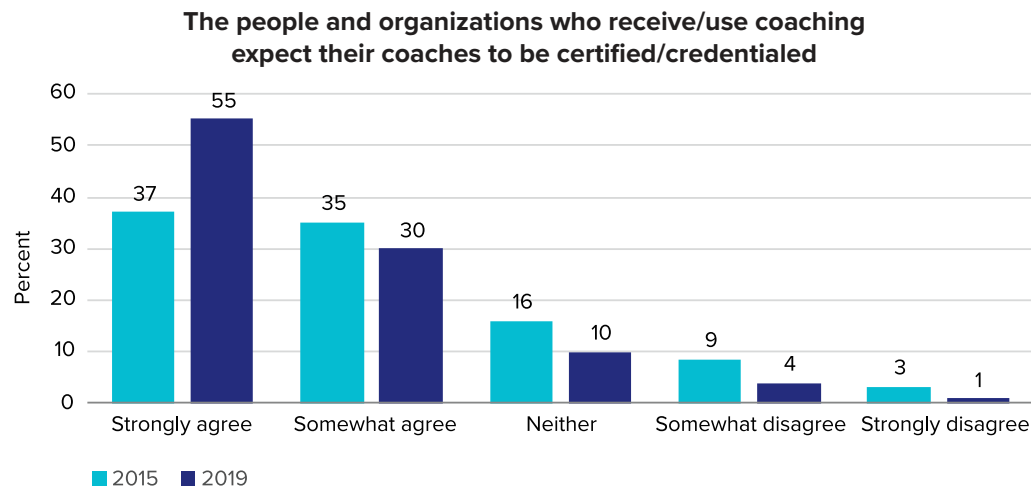
The vast majority of coach practitioners (95%) said they had completed 60 or more hours of training, up from 93% in 2015.

Among managers/leaders using coaching skills who said they have received coach-specific training, almost four in five (78%) said they had received 60 or more hours of coach-specific training.

A plurality of coach practitioners (43%) said they have received 200 hours or more training, compared with one in four (25%) managers/leaders using coaching skills.

Credentialing

Large majorities of both coach practitioners and managers/leaders using coaching skills agreed that individuals or organizations using coaching expect their coaches to be certified or credentialed.



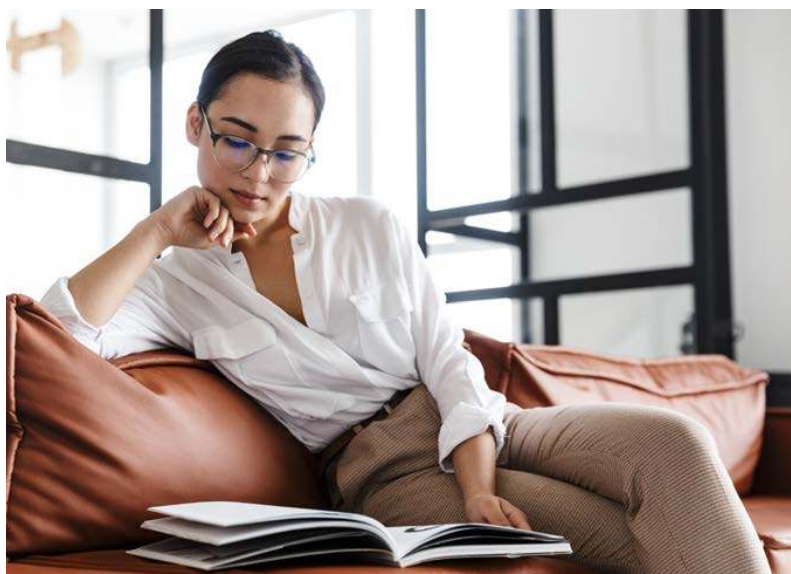
Almost three in four coach practitioners (74%) said they currently hold a credential or certification from a professional coaching organization, up from 70% in the 2016 study.

Forty-five percent of managers/leaders using coaching skills said they hold a certification/credential, including almost one in three (32%) holding an ICF credential.

It should be noted that the sample proportions for certifications and credentials partly reflect the role of ICF's Member and Credential-holder database in conducting the survey.

COACH PRACTITIONERS

- Compared with 2015, the proportion of coach practitioners who identify Business Coaching (i.e., coach practitioners who identified their main area of coaching as Leadership Coaching, Executive Coaching, Business/Organization Coaching or Small Business Coaching) as their main specialty increased by three percentage points, up from 62% in 2016 to 65% in 2019. The change was driven by the rise in the proportion of coaches citing Leadership Coaching as their main specialty, up from 25% in 2015 to 30% in 2019.
- Male coach practitioners are more likely to have a business specialty (74% compared with 61% of female coach practitioners).
- A little under one in five coach practitioners (17%) work as both an internal and external coach practitioner. On average, they devote a higher proportion of their time to their internal coaching practice (54%).
- Almost all coach practitioners (94%) offer services in addition to coaching. Most frequently, coach practitioners also offer consulting (60%), training (60%) and/or facilitation services (54%).
- The overall mix of clients served by coach practitioners has remained broadly unchanged since 2015. A little over one in two coach practitioners said their clients are mostly managers (27%) or executives (25%); the combined total of 52% is identical to the position in 2015. Similarly, the proportion coaching personal clients was unchanged at 19%.
- The mix of clients varies with coach practitioners' attributes, including: the region in which they live, their main area of coaching, coaching experience, age, gender and whether they work as an external or internal coach practitioner.
- The split between primary and sponsored clients is strongly related to the number of years coaching. The sponsored share ranges from 25% among coach practitioners with less than one year of experience to 64% for coach practitioners with ten or more years of experience.
- Among coach practitioners with a business specialty, 40% of engagements are typically for seven or more months, compared with 28% for coach practitioners with a non-business specialty.
- The typical coaching client is between 35 and 44 years old (37%). A little under one in three clients (30%) are in the 45–54 age range. Around one in four (24%) are under 35 years old.
- Coach practitioners most frequently engage with their clients in person. Almost one in four (24%) always engage on that basis while close to one in two (48%) do so frequently. The use of audio-video platforms has doubled in the past four years, from 24% in 2015 to 48% in 2019.
- The revenue/income received from coaching is linked to a variety of factors, including attributes of the coach practitioner, the range and mix of services offered, and client attributes. Years of experience continues to be the most important predictor of a coach's income/revenue from coaching.



The typical coaching client is between 35 and 44 years old (37%).

MANAGERS AND LEADERS USING COACHING SKILLS

- The majority of managers/leaders using coaching skills (61%) have a third-level (i.e., master's or doctoral) education, one in three (34%) are educated to secondary level (i.e., bachelor's degree).
- There has been a sharp rise among managers/leaders using coaching skills in the strength of agreement that clients expect their coaches to be certified/credentialed. The proportion of respondents who strongly agree rose from 37% in 2015 to 55% in 2019.
- The proportion of managers/leaders with 200 or more hours of coach training varies widely by region, from 39% in Latin America and the Caribbean to 14% in the Middle East and Asia.
- Almost three in four managers/leaders (74%) said they plan to enroll in additional coach-specific training in the next 12 months.
- Among those planning to enroll in additional training, a little over one in two (52%) said they wanted to enhance their coaching skills. The remaining 48% said they wanted to become a coach practitioner, with most intending to become a hybrid external and internal coach practitioner.
- Almost one in two managers/leaders (48%) are members of professional organizations.
- Perspectives on coaching differ across the regions. Almost two in three (65%) managers/leaders in Western Europe and the Middle East and Africa consider coaching to be a skillset. In Latin America and the Caribbean, 43% view coaching as a profession.
- Survey respondents were asked what they perceive to be the top three potential obstacles to building a strong coaching culture inside an organization. The top three obstacles identified were:
 - Limited support from senior leaders (50%).
 - Inability to measure impact of coaching (42%).
 - Lack of budget for coaching activities (38%).
- There was a considerable degree of consensus across all main demographics and by region regarding the top three obstacles.



There has been a sharp rise among managers/leaders using coaching skills in the strength of agreement that clients expect their coaches to be certified/credentialed.

THE FINAL REPORT

This summary report has presented the main findings from the *2020 ICF Global Coaching Study*. Detailed analysis and statistics can be obtained from the Final Report.

Topics included in the Final Report:

- The Size and Scope of the Profession
- Summary Business Indicators
- Coach Practitioners
- Managers and Leaders Using Coaching Skills

The Final Report also includes a suite of Data Tables and a detailed Technical Appendix.

COVID-19 AND THE COACHING INDUSTRY

The field work period for the *2020 Global Coaching Study* opened in May 2019 and ended December 2, 2019.

On December 31, 2019 – just four weeks after the survey closed – the World Health Organization (WHO) began to pick up media reports about a cluster of viral pneumonia cases in China's Wuhan province. Less than three months later, WHO had declared the COVID-19 outbreak a global pandemic as countries and territories worldwide moved into various phases of lockdown to slow the virus' transmission.

The world we live and work in today is dramatically different from the world we lived in during the second half of 2019. It will be months or years before we can fully appreciate the impact of the ongoing COVID-19 impact on coaches, managers/leaders who use coaching skills, and the individuals and organizations who partner with coaches. The *2020 Global Coaching Study* has enormous relevance as a benchmark: It is the last and best possible snapshot of the coaching industry, pre-pandemic. However, it is no longer a current snapshot. It is a picture of what *was*.

To better understand what *is*, in June 2020 ICF and PwC launched COVID-19 and the Coaching Industry, a snapshot survey designed to assess the impact of the pandemic on the coaching industry worldwide. Despite a relatively brief field period (less than one month), the survey yielded more than 10,000 responses from 140 countries and territories. We have published key findings from this research in a separate report, available free to ICF Members and non-members at coachfederation.org/2020study.