GLOBAL COACHING STUDY

2023 Final Report

ICF International Coaching Federation

Table of Contents

3 Executive Summary

9 Section 1: Introduction

16 Section 2: Size and Scope of the Profession

36 Section 3: Summary Business Indicators

49 Section 4: Coach Practitioners

78 Technical Appendix

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Executive Summary

Executive Summary

Introduction

This is a summary of the findings from the *2023 ICF Global Coaching Study*. The study was commissioned by the International Coaching Federation (ICF).

The *2023 ICF Global Coaching Study* represents the fifth 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, 2016, and 2020.

The full report is primarily focused on coach practitioners and the business of coaching, including annual revenue/income from coaching, fees per one-hour coaching session, number of coaching clients, and weekly hours spent working on coaching activities.

A coach practitioner is defined as someone who provides an ongoing partnership designed to help clients produce fulfilling results in their personal and professional lives. The coach's job is to provide support to enhance the skills, resources, and creativity that the client already has.

Methodology

The survey fieldwork phase commenced on October 26, 2022. The survey ran for six weeks and closed on December 2, 2022.

A number of approaches were deployed to reach out and engage worldwide with coach practitioners and managers/leaders using coaching skills, including:

- The use of ICF's extensive contacts lists to circulate personalized invitations and survey links.
- ICF members were asked to share a generic link to the online survey registration site with their wider networks of coaches; the intention of which was to initiate a "snowball" effect that would attract more non-ICF coaches.
- The survey was made available online in nine languages.
- The survey was designed so that it could be completed using a range of mobile devices.

Survey Outcomes

With a total of 14,591 valid responses from 157 countries, the study is large in scale and global in reach. More than 100 survey returns were received from 27 countries across all major world regions with a further 19 countries providing 50-99 returns. Notwithstanding a shorter survey period of six weeks, compared with a six-month survey period for previous studies, the global spread of the 2023 study sample is comparable with the reach achieved in the 2020 study (161 countries) and wider than the 2012 and 2016 studies (117 and 137 countries respectively). That is testimony to the success of the methods deployed to reach the global coaching community and facilitate participation in the study.

Of the 14,591 responses:

- 11,202 were provided by ICF members, (i.e., 77% of the total). The remaining 3,389 responses were received from non-ICF members.
- 13,146 (90%) were provided by coach practitioners. Respondents who self-identified as managers/leaders using coaching skills accounted for 1,445 returns (10%). The survey results for managers/leaders who use coaching skills will be separately reported.

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Structure of the Report

The report is structured as follows:

Section 1 Introduction.

Section 2 The Size and Scope of the Profession. This section presents estimates for the number of coach practitioners, globally and by world region.

Section 3 Summary Business Indicators. This section examines linkages between the key business indicators (annual revenue/income, hourly fee rates, hours working as a coach and number of active clients) and attributes of the coach (e.g., years' experience, main coaching specialty), as well as the nature of the engagement with the client (e.g., position of the client served, the proportion of clients who are sponsored).

Section 4 Coach Practitioners. This section presents a profile of coach practitioners, under the following headings: demographics, coaching services, training and credentialing, and the client.

The full report also contains a **Technical Appendix**, which provides further information on the approach to the *2023 ICF Global Coaching Study*, including an explanation of the methodology for estimating the number of coaches worldwide and by region.

Size and Scope of the Profession

The following are the key points from the analysis of the size and scope of the profession:

- Notwithstanding the COVID-19 pandemic, between 2019 and 2022, the coaching profession continued to expand at a robust pace. In 2022, the estimated number of coach practitioners exceeded 100,000 for the first time, reaching **109,200**, representing a 54% increase on the 2019 global estimate.
- The number of coach practitioners grew in all regions, most notably in the emerging regions of Asia (+86%), the Middle East and Africa (+74%), and Eastern Europe (+59%).
- With an estimated 54% increase, Latin America and the Caribbean grew in line with the global average.
- The more established regions also registered solid growth rates, from 42% in Oceania to 51% in Western Europe, with North America posting a 47% expansion.
- Over nine in 10 coach practitioners (91%) said they currently have active clients, giving an estimated **99,100 active coach practitioners**, representing a 55% increase compared with the position in 2019.
- In 2022, active coach practitioners generated an estimated annual revenue/income from coaching of **$4.564 billion** U.S. dollars (USD), representing a 60% increase over the 2019 estimate.
- The estimated 55% increase in active coach practitioners was the main factor driving the increase in total annual revenue from coaching.
- In addition, the average annual revenue/income from coaching is estimated to have risen by 12% between 2019 and 2022, to **$52,800 U.S. dollars**.
- Reflecting the diversity of coaches, **annual revenue/income from coaching** varies widely. Globally, more than one in two coaches (53%) reported less than $30,000 annual revenue/income from coaching.

The size and scale estimates for numbers of coach practitioners and revenue/income from coaching are summarized in the table on the next page.

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The coaching profession: Size and scale

	Coach practitioners	Active	Annual revenue / income from coaching	Total revenue
	#	*%*	*USD*	*USD million*
Asia	8,600	88%	$33,900	$248
Eastern Europe	10,000	89%	$18,700	$161
Latin America and the Caribbean	16,900	87%	$22,900	$332
Middle East and Africa	4,900	85%	$29,600	$118
North America	34,200	93%	$67,800	$2,088
Oceania	3,700	92%	$58,800	$195
Western Europe	30,800	92%	$52,400	$1,421
Global	**109,200**	**91%**	**$52,800**	**$4,564**

The key findings in relation to revenue drivers are as follows:

- The overall average fee per one-hour coaching session in 2022 was **$244 U.S. dollars**, representing a 9% increase compared with 2019.
- Average fees reported per one-hour coaching session vary widely, ranging from $277 in Western Europe to $114 in Latin America and the Caribbean.
- In 2022, the average active coach practitioner had **12.2 clients**, representing a 4% increase on the 2019 average (11.7 clients).
- In 2022, coach practitioners spent an average of **11.9 hours per week** working as a coach, only slightly lower (2%) than the average of 12.1 hours reported for 2019.

The key revenue drivers are summarized in the table below.

Summary of revenue drivers

	Average fee reported per one-hour session	Average hourly revenue recovered	Hours per week (average)	Active clients currently coaching (average)
	USD	*USD*	*#*	*#*
Asia	$226	$70	9.2	11.5
Eastern Europe	$138	$47	7.7	8.4
Latin America and the Caribbean	$114	$38	11.4	10.2
Middle East and Africa	$165	$62	9.1	11
North America	$272	$98	13.3	13.5
Oceania	$259	$85	13.3	13.8
Western Europe	$277	$84	12	11.5
Global	**$244**	**$85**	**11.9**	**12.2**

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Looking ahead, coach practitioners are optimistic regarding the business outlook for coaching in 2023. Almost three in four (73%) expect to see an increase in their annual revenue/income, driven by a majority of coaches anticipating growth in coaching sessions (61%) and the number of clients (70%).

Summary Business Indicators

The following are the key points from the survey findings for business indicators (annual revenue/income from coaching, fee per one-hour session, clients and hours):

- On average, years of **coaching experience is positively linked to the drivers of coaching revenue**. Typically, the more experienced the coach, the higher the reported average fee per one-hour coaching session, the greater the number of clients, and the more weekly hours spent working as a coach.
- Consequently, more experienced coaches have higher annual income/revenue from coaching.
- Coaches specializing in business coaching tend to have above-average revenue/income from coaching, primarily reflecting a higher average level of fees per one-hour coaching session.
- The position held by the coach's clients **exerts an important influence on fees** per one-hour session, with those coaches who mainly serve executives commanding the highest hourly fees and also earning the highest annual revenue/income from coaching.
- Revenues and fees are positively related to the proportion of clients whose coaching is sponsored (i.e., coaching is paid for by someone other than the client). On average, the higher the proportion of clients who are sponsored, the higher the hourly fee and annual revenue/income from coaching.
- The factors linked to annual revenue/income and reported fees per one-hour session tend to overlap.
- The proportion of clients who are sponsored tends to be higher among those with a business coaching specialty compared with non-business specialties.
- Similarly, the **more experienced coaches** are also more likely to have a **business coaching specialty**. They are also more likely to have a majority of clients who are in an executive position.
- These linkages, in turn, help to explain the higher fees and annual revenues earned by more experienced coaches and those with a business Coaching specialty.

Coach Practitioners

The following are the key findings from the profile of coach practitioners.

Demographics

- Almost **one in two coach practitioners (48%) are in the Generation X** age cohort, ranging from 40% in North America to 62% in Eastern Europe.
- The proportion of coach practitioners who are Baby Boomers ranges from 16% in Eastern Europe to 49% in North America. North America and Oceania are the only regions where Baby Boomers outnumber Generation X coaches.
- Globally, **Millennials account for one in 10 coach practitioners**, ranging from 21% in Eastern Europe to 8% in North America and 7% in Oceania.
- The female share of coach practitioners has been edging steadily upward, reaching 72% in 2022, up from 70% in 2019 and 67% in 2015.
- Compared with the position in 2019, the largest increase in the female share was in the Middle East and Africa, up from 66% to 72% in 2022.
- The female share of coach practitioners ranges from **59% in Asia to 78% in Eastern Europe**.
- The vast majority of coaches hold a degree-level qualification or higher, including 30% with a bachelor's degree and 65% with a more advanced degree.

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Coaching Services

- Coaching experience is positively linked to the age of the coach practitioner.
- The percentage of coach practitioners with less than five years' experience is higher in the younger age groups. Almost two in three **Millennials (66%) have less than five years' experience** compared with 40% of Generation X coaches and 22% of Baby Boomers.
- Leadership was the main area of coaching most frequently mentioned in the 2022 survey (34%), followed by executive coaching (17%) and business/organizations (13%). Along with small business (3%), those four areas of coaching are referred to collectively as **business coaching** throughout the report.
- The proportion identifying business coaching as their main specialty has been steadily rising, up from 62% in 2015 to 65% in 2019 and 67% in 2022.
- A little under one in five coach practitioners (16%) work as both an internal and external coach. On average, they devote a majority of their time to internal coaching duties (56%).
- Almost all coach practitioners **(93%) offer services in addition to coaching**. Most frequently, coaches also offer consulting (59%), training (58%), and/or facilitation services (55%). On average, coach practitioners offer almost three (2.8) services in addition to coaching. That is unchanged from 2015 and 2019.

The Client

- In 2022, a little over one in two coach practitioners said their clients are mostly managers (31%) or executives (25%). The combined total of 56% represents an increase compared with 2019 (52%).
- The mix of clients varies with the coaches' attributes, including the region in which they live, their main area of coaching, years of experience, age, gender, and whether they work as an external or internal coach practitioner.
- On average, coach practitioners said that **57% of their clients are sponsored and 43% are primary clients**. Compared to 2019, the sponsored share has increased (up from 52%) while the primary share has fallen (from 48%).
- The **majority of coaching clients (58%) are female**. When compared with 2019, the average female share of clients has not changed significantly (57% in 2019).
- Clients aged between 35 and 44 years (37%) are most frequently in receipt of coaching services, followed by clients in the 45 to 54 age range (32%). Around one in five (21%) are aged under 35 years. The age composition of coaching clients in 2022 was very similar to the position in 2019.

Membership and Credentials

- The overwhelming **majority of coaches (80%)** agree that their clients expect coaches to be certified/credentialed, including 42% strongly agreeing and 38% somewhat agreeing.
- More than eight in 10 coach practitioners (86%) said they are a member of one or more coaching organizations, up from 79% in 2015 and 82% in 2019.
- An increasing proportion of coach practitioners hold a certification/credential from a coaching organization. In the 2022 survey, 85% said they currently hold a certification/credential from a coaching organization, up from 69% in 2015 and 74% in 2019.

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Section 1:
Introduction

Section 1 Introduction

Introduction

This report presents the findings from the *2023 ICF Global Coaching Study*. The study was commissioned by the International Coaching Federation (ICF).

The report is primarily focused on coach practitioners and the business of coaching, including annual revenue/income from coaching, fees per one-hour coaching session, numbers of coaching clients, and weekly hours spent working on coaching activities.

Founded in 1995, ICF is dedicated to advancing the coaching profession by setting high ethical standards, providing independent certification, and building a worldwide network of credentialed coaches. ICF is a global organization, with a membership comprising more than 55,000 trained personal and business coaches located in over 150 countries.

ICF defines coaching as partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.

In late 2006, ICF commissioned its first-ever global industry study to provide a baseline picture of the profession, to identify what coaches saw as the major challenges they face, and to estimate the size of the profession.

In mid-2011, ICF launched its second global industry study. The results were published in the *2012 ICF Global Coaching Study.* That was followed by the *2016 ICF Global Coaching Study*, based upon survey responses collected in 2015. The *2020 ICF Global Coaching Study* reported on the findings from the survey launched globally in mid-2019.

The next part of this introductory section provides a summary of the research objectives, methodology, and survey outcomes; a more detailed description is provided in the Technical Appendix at the end of this report. This section concludes with an outline of the structure of the report.

Objectives

The objectives of the *2023 ICF Global Coaching Study* were as follows:

- To determine estimates of coaching fees and revenue, both by geographic region and global total.
- To gain an understanding of the main types of coaching specialties currently being undertaken by coach practitioners, including the types of clients receiving coaching.
- To obtain profiling information of professional coach practitioners (e.g., gender, age, level of education, coach-specific training, membership in coaching organizations, and certification).
- To obtain similar indicative profiling information of managers and leaders who use coaching skills.

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Definitions

Similar to the 2016 and 2020 studies, survey respondents were first asked if they self-identified as a professional coach. All survey respondents were then asked a follow-up question to distinguish between those who consider themselves primarily as coach practitioners or managers/leaders who use coaching skills. Respondents were asked to select one of six designations to best describe 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.
- Human resources/talent development manager/director who uses coaching skills.
- Manager/leader who uses coaching skills.

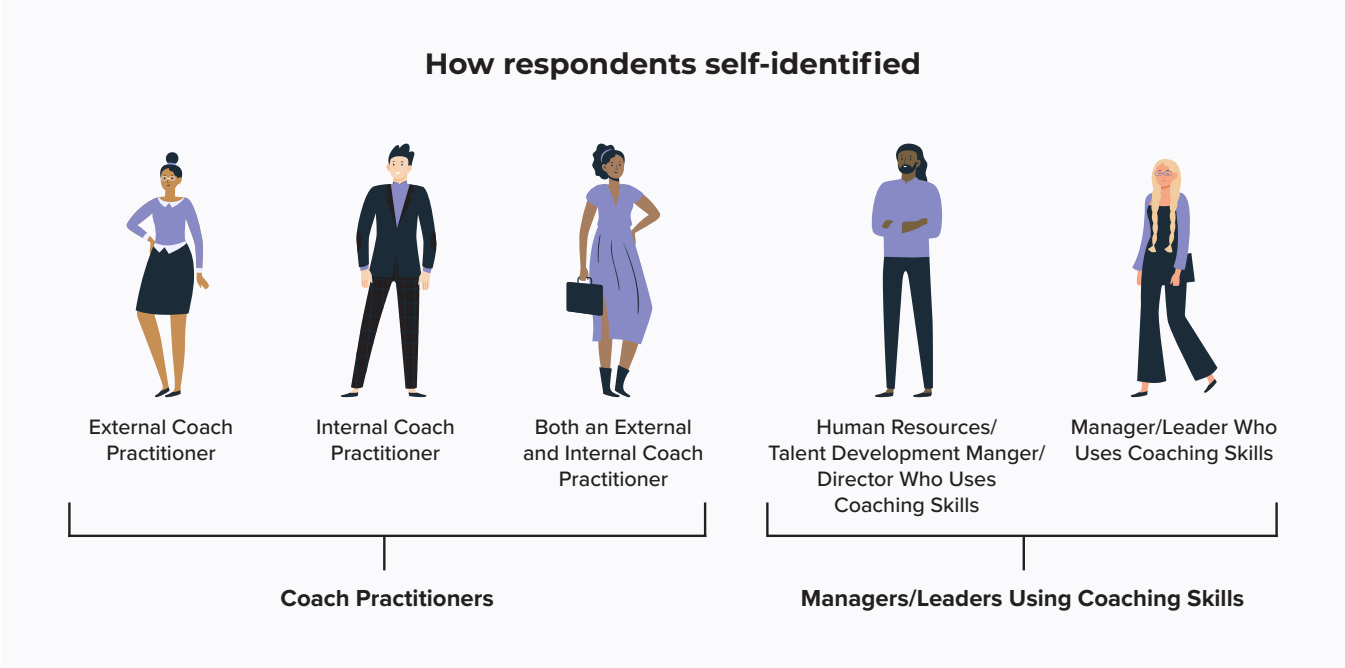
The following definitions were provided to respondents:

Coach practitioner – Someone who provides an ongoing partnership designed to help clients produce fulfilling results in their personal and professional lives. The coach's job is to provide support to enhance the skills, resources, and creativity that the client already has.

External coach practitioner – A professional coach practitioner who is either self-employed or partners with other professional coaches to form a coaching business.

Internal coach practitioner – A professional coach practitioner who is employed within an organization and has specific coaching responsibilities identified in their job description.

Manager/leader using coaching skills – A manager or leader who works with their subordinates within the organization to create awareness and support behavior change. This is accomplished using coaching knowledge, approaches, and skills.



Respondents who said that none of the above designations describes what they primarily do were considered out of scope and screened out.

The foregoing definitions are intended to reflect the "coaching continuum" to describe the 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. 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 derive or have derived 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 their 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*.

The presentation of survey results in this report focuses on coach practitioners.

Structure of the Questionnaire

The questionnaire for the *2023 ICF Global Coaching Study* consisted of four main sections:

- **The coach.** *All respondents* were asked to provide information relating to their location, gender, age, education, membership in coaching organizations, and coaching credentials. *Coach practitioners* were also asked to say how many years they have been coaching along with their main coaching specialty and whether they provide services in addition to coaching. *Active coach practitioners* are identified as those currently with one or more active clients. They were asked to say how many clients they coach and their hours per week working as a coach.
- **The client.** This second set of questions sought information from *active coach practitioner respondents r*egarding the people to whom they provide coaching services.
- **The size of the profession.** This section asked *active coach practitioners* about their current annual revenue/income from coaching; fees per one-hour session; and their expectations for the next 12 months in relation to clients, fees, sessions, and revenue/income.
- **The future of coaching.*** The final section sought the views of *all respondents* on a range of issues affecting the future of coaching as it emerges from the COVID-19 pandemic.

The survey results presented in this report are drawn from coach practitioner responses to the first three modules of the questionnaire, (i.e., the coach, the client, and the size of the profession). The future of coaching module results will be disseminated separately.

The questionnaire used for the 2023 study is similar to the instruments employed in previous iterations of the *ICF Global Coaching Study*, facilitating comparisons across a range of topics.

Methodology

The survey fieldwork phase commenced on October 26, 2022. The survey ran for six weeks and closed on December 2, 2022.

A number of approaches were deployed to engage worldwide with coach practitioners and managers/leaders using coaching skills.

ICF's extensive contacts lists were used to circulate personalized invitations and survey links. In addition to current ICF members, invitations to participate in the survey were sent to non-members holding ICF credentials, expired ICF members, and other databases existing within ICF, such as inquiries regarding membership, credentialing/certification, and location of ICF chapters.

ICF members were asked to share a generic link to the online survey registration site with their wider networks of coaches; the intention of which was to initiate a "snowball" effect that would attract more non-ICF coaches.

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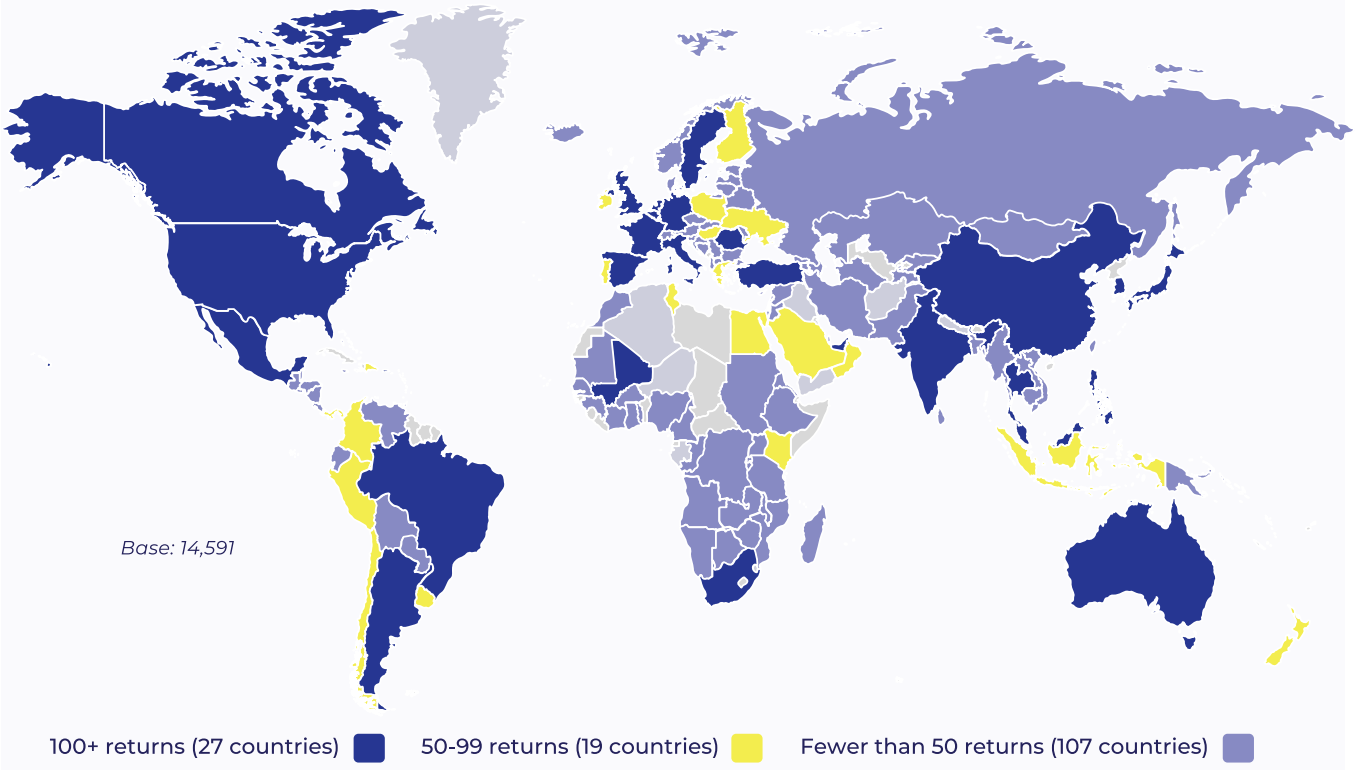
In addition, the survey was implemented to ensure that it was readily accessible to all potential respondents. Thus, the survey was made available online in nine languages (English, French, German, Italian, Japanese, Korean, Portuguese, Mandarin, and Spanish).

The survey was designed so that it could be completed using a range of mobile devices.

Survey Outcomes

With a total of 14,591 valid responses from 157 countries, the study is large in scale and global in reach. More than 100 survey returns were received from 27 countries across all major world regions with a further 19 countries providing 50-99 returns. Notwithstanding a shorter survey period of six weeks compared with a six-month survey period for previous studies, the global spread of the 2023 study sample is comparable with the reach achieved in the 2020 study (161 countries) and wider than the 2012 and 2016 studies (117 and 137 countries respectively). That is testimony to the success of the methods described above to reach the global coaching community and facilitate participation in the study.

The global reach of the *2023 ICF Global Coaching Study*



Geographical spread of survey returns for the *2023 ICF Global Coaching Study*

Survey returns	2023 Countries/ Territories	2020 Countries/ Territories	2016 Countries/ Territories	2012 Countries/ Territories
100+	27	52	40	31
50-99	19	8	8	7
Fewer than 50	107	101	89	79
Total	**153**	**161**	**137**	**117**

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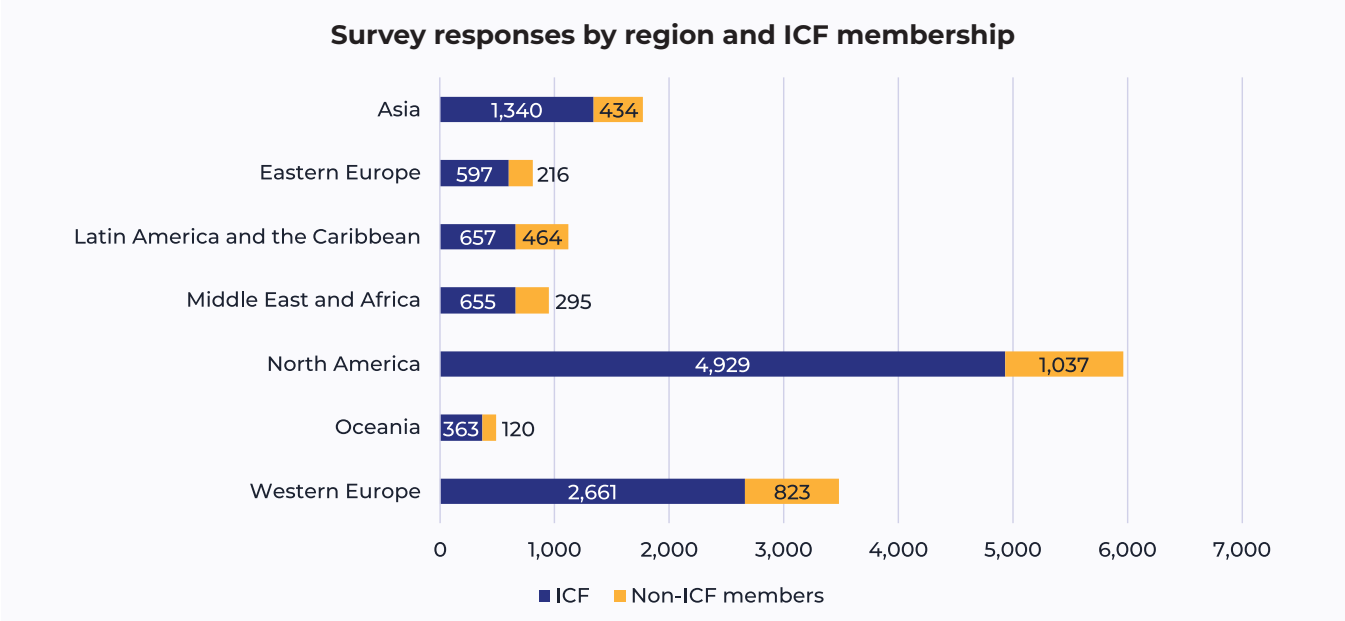
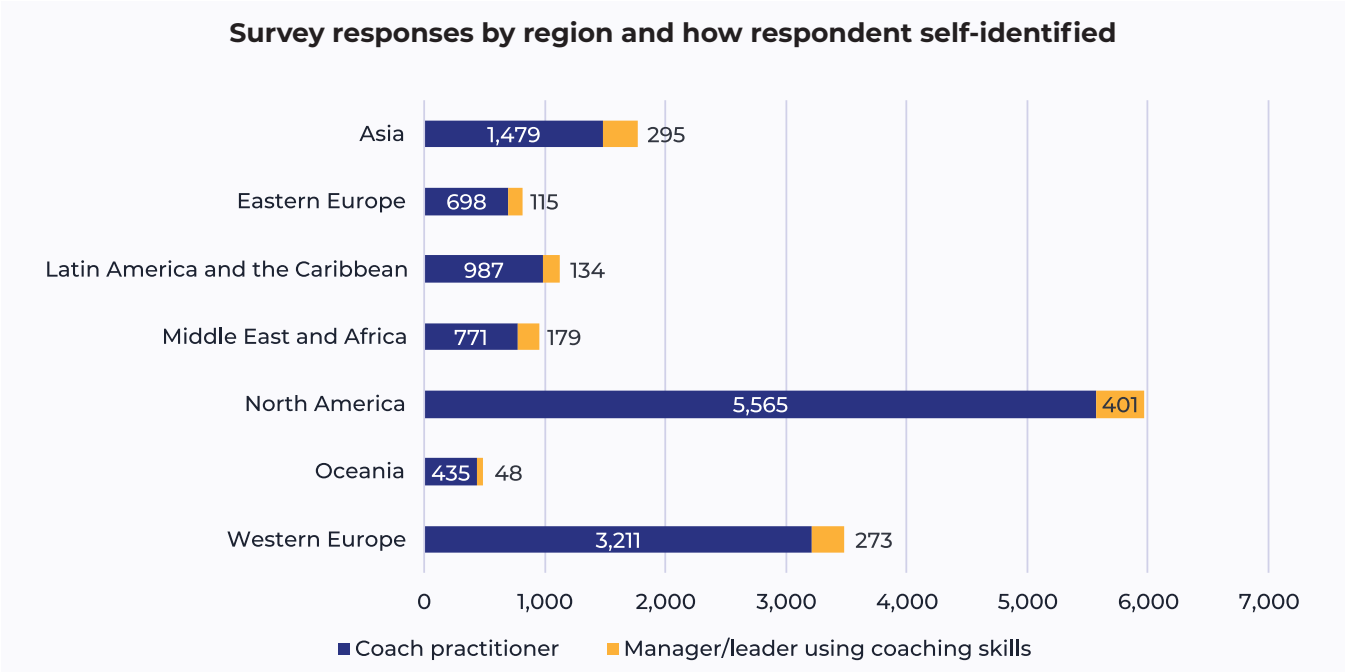
Of the 14,591 responses, 11,202 were provided by ICF members (77% of the total). With a 48% share of total ICF membership, the largest number of ICF member responses was from North America (4,929), followed by Western Europe (2,661).

A total of 3,389 responses were received from non-ICF members, including 1,037 from North America and 823 from Western Europe.



Of the 14,591 total responses, 13,146 (90%) were provided by coach practitioners. Respondents who self-identified as managers/leaders using coaching skills accounted for 1,445 returns (10%).

The number of coach practitioner responses was highest in North America, at 5,565 (42% of the total), followed by Western Europe with 3,211 (24%) and Asia with 1,479 responses (11%).



Structure of the Report

The remainder of this report is structured as follows:

Section 2 The Size and Scope of the Profession. This section presents estimates for the number of coach practitioners, globally and by world region. The estimates for the numbers of coach practitioners are combined with the survey results for average annual revenue/income from coaching to produce an estimate for global coaching revenue. The section also discusses the survey results for average fees per one-hour session, hours working as a coach, and number of active clients. The section concludes with a look at coach practitioners' views regarding their business prospects over the next 12 months.

Section 3 Summary Business Indicators. This section examines linkages between the key business indicators (annual revenue/income, hourly fee rates, hours working as a coach and number of active clients) and attributes of the coach (e.g., years' experience, main coaching specialty), as well as the nature of the engagement with the client (e.g., position of the client served, the proportion of clients who are sponsored).

Section 4 Coach Practitioners. This section presents a profile of coach practitioners, under the following headings: demographics, coaching services, the client, and memberships and credentials.

Section 5 Technical Appendix. This section provides further information on the approach to the *2023 ICF Global Coaching Study,* including an explanation of the methodology for estimating the number of coaches worldwide and by region.

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.*

NOTE: *Due to rounding in some instances, sums may not add to 100%.*

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Section 2:
Size and Scope of the Profession

Section 2 Size and Scope of the Profession

Introduction

A key objective for the *2023 ICF Global Coaching Study* was to determine estimates for the size and scope of the coaching profession both globally and by geographic region. This section commences with a presentation and discussion of the estimates for the following key statistics:

- The estimated number of coach practitioners.
- The number of coach practitioners with active clients.
- Revenue/income from coaching.

The section then presents the survey results for the following key drivers of revenue/income from coaching:

- Average fee per one-hour coaching session.
- Average number of active clients currently coaching.
- Average number of hours spent working as a coach.

The section concludes with a look at coach practitioners' views regarding their business prospects over the next 12 months, as measured by the expected direction of changes in client numbers, fees, number of coaching sessions, and revenue/income from coaching.

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The Number of Coach Practitioners

There does not currently exist an accepted, globally inclusive list of coach practitioners. Consequently, it was necessary to estimate the number of coaches, both globally and by region, using a combination of known total ICF membership figures 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. The estimation procedure benefits considerably from robust ICF membership counts and the large scale of the global survey, which includes non-ICF members. Nonetheless, it should be recognized that the size and scale estimates presented in this section are subject to uncertainty.

Globally, it is estimated that there are approximately **109,200** coach practitioners. With an estimated 34,200 practitioners, North America accounts for the largest share (31%) followed by Western Europe, with an estimated 28% share (30,800 coach practitioners).

Between 2019 and 2022, the number of coach practitioners is estimated to have increased by 54%. Growth was especially strong in the emerging regions of Asia (+86%), the Middle East and Africa (+74%) and Eastern Europe (+59%).

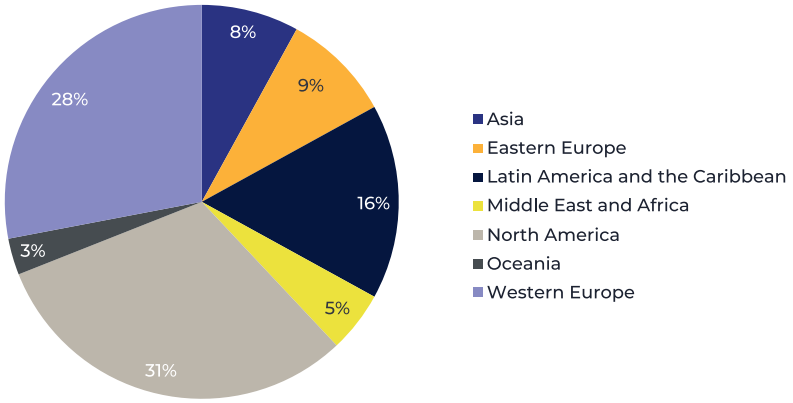
With an estimated 54% increase, Latin America and the Caribbean grew in line with the global average. The more established regions registered slightly below average growth rates, from 42% in Oceania to 51% in Western Europe, with North America posting a 47% expansion.

The COVID-19 pandemic was the dominant factor shaping the global economy and workplace in the period between 2019 and 2022. The robust growth rates in the numbers of coach practitioners across each world region would therefore suggest that coaching was one of the industry sectors which emerged strongly from the pandemic.

Table 2.1 Coach practitioners: Estimates by world region, 2022

	#	% of global	% change 2019-2022
Asia	8,600	8	86%
Eastern Europe	10,000	9	59%
Latin America & the Caribbean	16,900	16	54%
Middle East and Africa	4,900	4	74%
North America	34,200	31	47%
Oceania	3,700	3	42%
Western Europe	30,800	28	51%
Global	**109,200**	**100**	**54%**

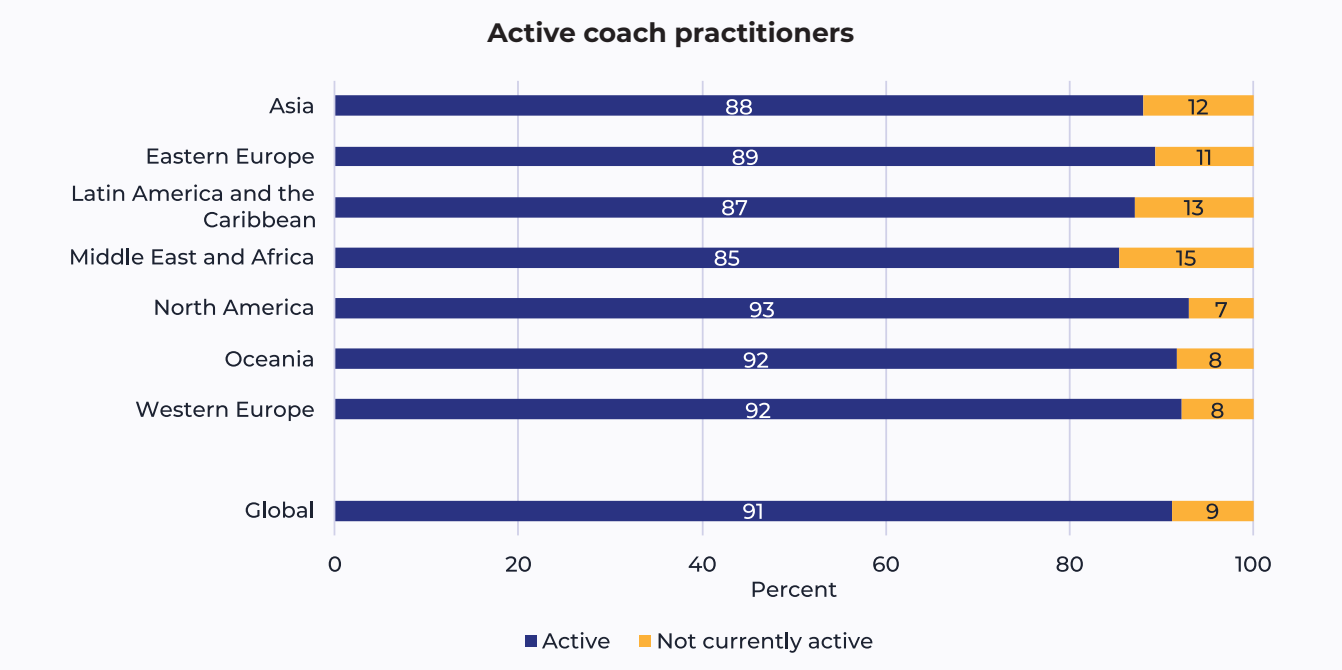
Coach practitioners: Distribution by region



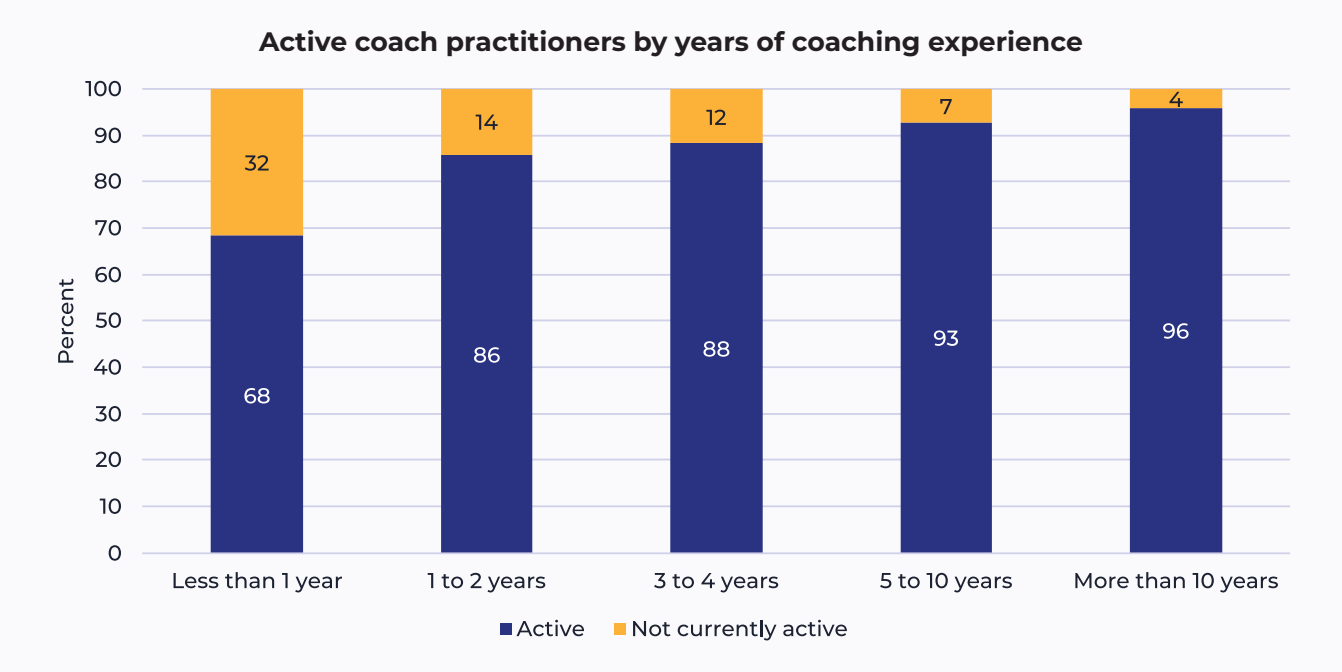
Active Coach Practitioners

Respondents who self-identified as coach practitioners were asked about their current level of coaching activity, specifically, whether they have active clients to whom they were providing coaching services at the time the survey was conducted in 2022. *Only active coaches were asked about revenues, fees per one-hour coaching session, and number of clients.*

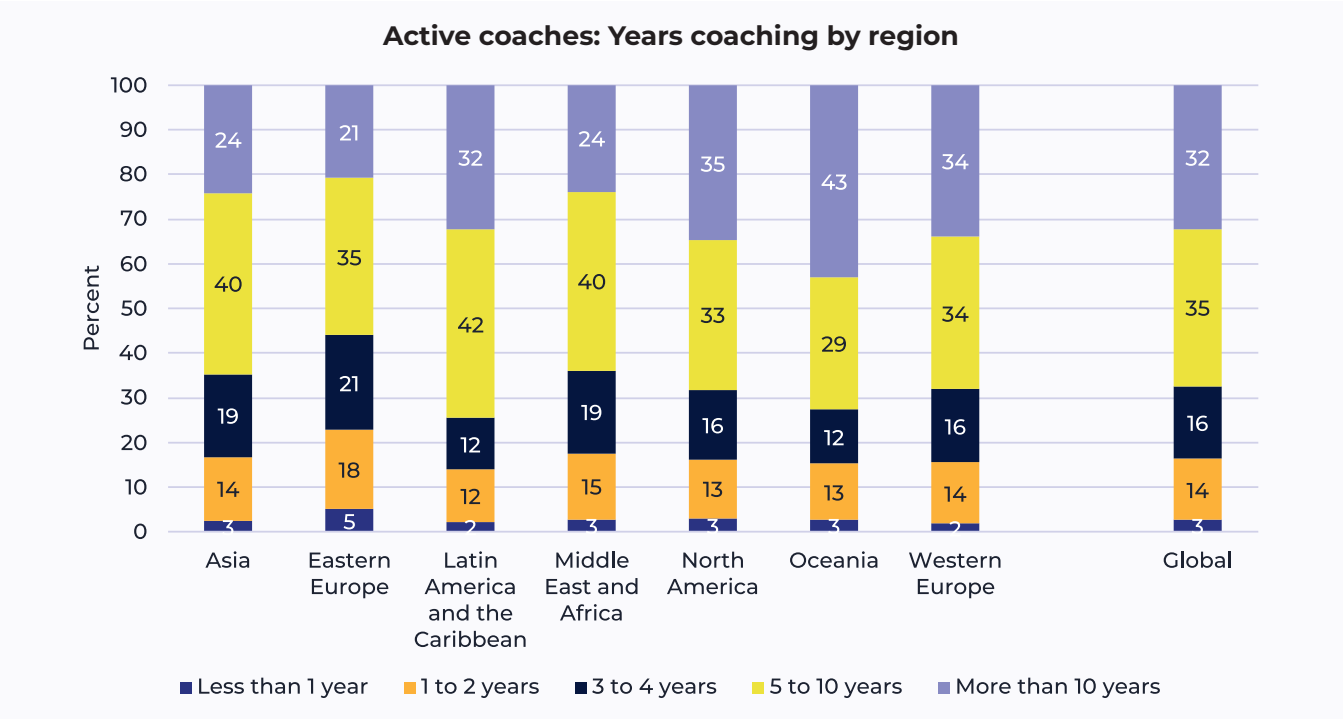
Over nine in 10 coach practitioners (91%) said they currently have active clients. The proportion with active clients tends to be higher in the more established regions, (i.e., North America (93%), Oceania (92%) and Western Europe (92%)). In the emerging regions, the proportion ranges from 85% in the Middle East and Africa to 89% in Eastern Europe. The broad regional pattern is unchanged from previous surveys.



The proportion of coaches with active clients increases with years of coaching experience, rising from 68% of coaches with less than one year's experience to 96% of coaches who have been practicing for more than 10 years.



Regional differences in the proportion of respondents with active clients partly reflect regional contrasts in years of coaching experience. The share of active coaches with 10 or more years of experience is highest in the more established regions, ranging from 34% in Western Europe to 43% in Oceania. By contrast, in the emerging regions, there are proportionately fewer active coaches with 10 or more years of experience, ranging from 21% in Eastern Europe to 32% in Latin America and the Caribbean.



Combining the estimate for the total number of coach practitioners with the proportion saying they have one or more active clients yields an estimated 99,100 coach practitioners with one or more active clients.

With almost 32,000 active coaches, North America accounts for the largest share of the global total (32%), followed by Western Europe with 28,400 coaches and a global share of 29%.

However, when compared with the position in 2019, the emerging regions registered the fastest growth rates, led by Asia (96%) and the Middle East and Africa (73%).

Table 2.2 Active coach practitioners by region

	#	% of global	% change 2019-2022
Asia	7,600	8	96%
Eastern Europe	8,900	9	63%
Latin America and the Caribbean	14,700	15	56%
Middle East and Africa	4,200	4	73%
North America	31,800	32	48%
Oceania	3,400	3	45%
Western Europe	28,400	29	51%
Global	**99,100**	**100**	**55%**

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Annual Revenue/Income from Coaching

Survey respondents with active clients were asked to give their annual revenue or income generated by ***coaching only.*** Respondents provided annual revenue data in a variety of different currencies, depending on the country in which they reside. A total of 73 different currencies were used.

In order to provide a common reference point, the revenue figures have been 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 established markets of North America, Western Europe, and Oceania.

Table 2.3 Average annual revenue/income from coaching (USD)

	Average USD
Asia	$33,900
Eastern Europe	$18,700
Latin America and the Caribbean	$22,900
Middle East and Africa	$29,600
North America	$67,800
Oceania	$58,800
Western Europe	$52,400
Global	**$52,800**

It is important to note that, globally and within each of the world regions, there is considerable dispersion around the average annual revenue/income figures, for several reasons.

Coach practitioners vary in the number of clients that they coach, the fees that they charge per one-hour coaching session, and the weekly hours that they work as a coach. Those drivers of annual coaching revenue/income are examined at the regional level in this section and by attributes of the coach practitioner in Section 3.

As outlined in Section 4, coach practitioners exhibit considerable diversity across a range of attributes, such as years of coaching experience, coaching specialties, characteristics of the client (i.e., whether an executive or personal client, etc.), and whether the coaching is sponsored or not. Annual revenue/income from coaching and the drivers of coaching revenue vary with those factors; the relationships are discussed in Section 3 of this report.

Further, survey respondents were not asked to give their revenue/income from all sources and almost all active coach practitioners (93%) offer additional services such as consulting (60%), training (58%), and mentoring (43%).

A further point to note is that the revenue figures calculated in U.S. dollar terms do not account for the differences between countries in the prices of goods and services. The purchasing power of a dollar revenue figure will be higher where the average price level is lower than in the U.S., and vice versa.

It is possible to take account of such price differences by adjusting international exchange rates using purchasing power parities (PPPs) to calculate annual revenue in international U.S. dollars.

The PPP adjusted revenue is lower than the unadjusted figures in regions such as Western Europe where prices tend to be higher than in the U.S. Conversely, the adjusted figure is higher in regions such as Latin America and the Caribbean where prices tend to be lower.

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Table 2.4 Average annual revenue/income from coaching, PPP (international USD)

	Average PPP
Asia	$63,800
Eastern Europe	$40,300
Latin America and the Caribbean	$46,600
Middle East and Africa	$65,800
North America	$67,800
Oceania	$55,100
Western Europe	$59,100
Global	**$61,900**

Regional differences in annual revenue/income calculated on a PPP basis are therefore much less pronounced by comparison with the contrasts on a USD basis. For example, the average revenue for Latin America and the Caribbean is 75% of the global average on a PPP basis versus 43% on the U.S. dollar basis.

Similarly, the PPP estimate for the Middle East and Africa is 6% above the global PPP average whereas the region's average revenue on a U.S. dollar basis is 44% lower than the global average.

While they are interesting to observe, the *PPP adjusted revenue figures should nonetheless be interpreted with considerable caution*. PPPs are difficult to calculate in many countries since they depend on making comparisons with U.S. prices.

Also, PPPs are most appropriate for comparing average levels of per capita welfare, but the basket of goods and services that a coach may demand in their country of residence may vary from the average.

Finally, PPP-adjusted figures are notional amounts whereas U.S. dollar revenues correspond to cash values (albeit subject to currency fluctuations).

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The average revenue/income from coaching estimates for 2022 can be compared with the 2019 figures published in the *2020 ICF Global Coaching Study*. The comparison in U.S. dollar terms shows a rise of 12% while the PPP comparison gives an increase of 8%. At the global level, therefore, the two measures give a broadly similar picture of an increase in average annual revenue/income between 2019 and 2022.

On a regional basis, the estimated percent changes in average revenue/income from coaching are also reasonably aligned between the USD and PPP measures. That is because, in the period from 2019 to 2022, exchange rate fluctuations have not hugely affected the comparisons (see the discussion in the Technical Appendix for further detail).

The main exception is Latin America and the Caribbean, where the strengthening of the U.S. dollar has had a discernible effect on the estimated growth in annual revenue/income from coaching between 2019 and 2022. In that region, average annual revenue/income from coaching is estimated to have increased by 10% on a U.S. dollar basis compared with 21% on a PPP basis.

In addition, it should be noted that the revenue/income estimates are survey-based and can therefore be expected to fluctuate between surveys.

Table 2.5 Revenue/income from coaching, Percent change, 2022 compared to 2019

	USD	PPP
Asia	1%	-4%
Eastern Europe	-3%	-4%
Latin America and the Caribbean	10%	21%
Middle East and Africa	-15%	-17%
North America	8%	8%
Oceania	-4%	-1%
Western Europe	3%	7%
Global	**12%**	**8%**

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Total Revenue from Coaching

For each of the seven world regions, total revenue/income from coaching is derived by combining the estimates for average annual revenue/income from coaching (Table 2.3) with the estimated number of active coaches (Table 2.2).

On that basis, the estimated global total revenue from coaching in 2022 was **$4.564 billion U.S. dollars**, representing a 60% increase over the 2019 estimate.

The main factor driving the growth in global revenues was the 55% rise in the number of active coaches.

Underpinned by strong growth in their estimated numbers of active coaches, all seven world regions are estimated to have registered substantial growth in annual revenues, ranging from 41% in Oceania to 97% in Asia.

In North America, total revenue is estimated to have exceeded $2 billion for the first time, rising by 61% from $1.3 billion in 2019 to $2.1 billion in 2022.

In combination, the emerging regions of Asia, Eastern Europe, Latin America and the Caribbean, and the Middle East and Africa posted revenue growth of 73%, ahead of the combined 58% growth estimate for the established regions of North America, Oceania, and Western Europe.

Table 2.6 Total annual revenue from coaching, 2022

	USD (million)	% change 2019-2022	share of global (%)
Asia	$248	97%	5.4
Eastern Europe	$161	59%	3.5
Latin America and the Caribbean	$332	74%	7.3
Middle East and Africa	$118	48%	2.6
North America	$2,088	61%	45.8
Oceania	$195	41%	4.3
Western Europe	$1,421	55%	31.1
Global	**$4,564**	**60%**	**100**

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The Coaching Profession: Size and Scale

The size and scale estimates for numbers of coach practitioners and revenue/income from coaching are summarized in the table below.

Table 2.7 The coaching profession: Size and scale

	Coach practitioners	Active	Annual revenue / income from coaching	Total revenue
	#	*%*	*USD*	*USD million*
Asia	8,600	88%	$33,900	$248
Eastern Europe	10,000	89%	$18,700	$161
Latin America and the Caribbean	16,900	87%	$22,900	$332
Middle East and Africa	4,900	85%	$29,600	$118
North America	34,200	93%	$67,800	$2,088
Oceania	3,700	92%	$58,800	$195
Western Europe	30,800	92%	$52,400	$1,421
Global	**109,200**	**91%**	**$52,800**	$4,564

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Drivers of Annual Revenue/Income from Coaching

Average annual revenue/income from coaching is driven by:

- The fee per one-hour coaching session.
- The average number of active clients.
- Average weekly hours working as a coach.

As illustrated in the table below, average annual revenue from coaching increases with each of those three key drivers. Further, the drivers are inter-related. For example, weekly hours working as a coach increases in tandem with the number of current active clients.

The regional patterns in the drivers of annual revenue/income are discussed in the next part of this section.

Table 2.8 Drivers of average annual revenue/income from coaching

	Fee per one-hour session	Current active clients	Weekly hours
Annual Revenue USD	*USD*	*Average #*	*Average #*
Less than $1,000	$97	6.5	6.6
$1,000-$9,999	$135	6.5	6.4
$10,000-$29,999	$199	9.7	9.0
$30,000-$49,999	$243	13.9	12.9
$50,000-$74,999	$277	17.4	16.8
$75,000-$99,999	$332	20.0	19.0
$100,000-$149,999	$391	20.0	19.8
$150,000+	$574	23.6	25.6
All	**$244**	**12.2**	**11.9**

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Average Fees Reported Per One-Hour Coaching Session

Coach practitioners with active clients were asked to report their average fee for a one-hour coaching session.

The overall average fee in 2022 was **$244 U.S. dollars**, ranging from $277 in Western Europe to $114 in Latin America and the Caribbean. In general, average fees per one-hour session are higher in the more established regions by comparison with the emerging regions.

Globally, average fees for a one-hour session are estimated to have risen by 9% when compared with 2019 ($223 U.S. dollars). The estimated growth in hourly fees varied by world region, with the fastest rates registered in the Middle East and Africa (+17%) and North America (+12%). Again, the percent changes are affected by fluctuations in the USD exchange rate and the variability that accompanies survey-based estimates.

Table 2.9 Fees per one-hour coaching session

	USD	% change 2019-2022
Asia	$226	-7%
Eastern Europe	$138	4%
Latin America and the Caribbean	$114	-7%
Middle East and Africa	$165	17%
North America	$272	12%
Oceania	$259	-1%
Western Europe	$277	2%
Global	**$244**	**9%**

Similar to average revenues, fees per one-hour coaching session vary widely. Globally, one in two coaches said their fee per one-hour session was less than $180 U.S. dollars (the median) while 50% said their fees exceeded $180 U.S. dollars.

Differences between coaches in reported fees per one-hour session reflect a range of factors, including:

- The characteristics of the coach practitioner (i.e., more experienced coach practitioners tend to report higher average fees).
- The nature of the client (i.e., hourly fees per session tend to be higher for coaches who work primarily with executives, business owners, or managers, and lower for those who work primarily with personal clients).

The factors that are linked to hourly fee rates also tend to overlap (i.e., more experienced coach practitioners are more likely to have executives as their clients). The overlaps between the characteristics of the coach practitioner and the nature of the client are explored in Section 4 of this report. The relationships with hourly fee rates are outlined in further detail in Section 3.

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Number of Active Clients

In 2022, the average active coach practitioner had 12.2 clients, representing a 4% increase over the 2019 average (11.7 clients).

Globally, the average number of clients reported by coach practitioners has been edging upwards, from 11 in 2015 to 12.2 in 2022. That steady upward movement has mainly occurred in Asia, North America, and Western Europe.

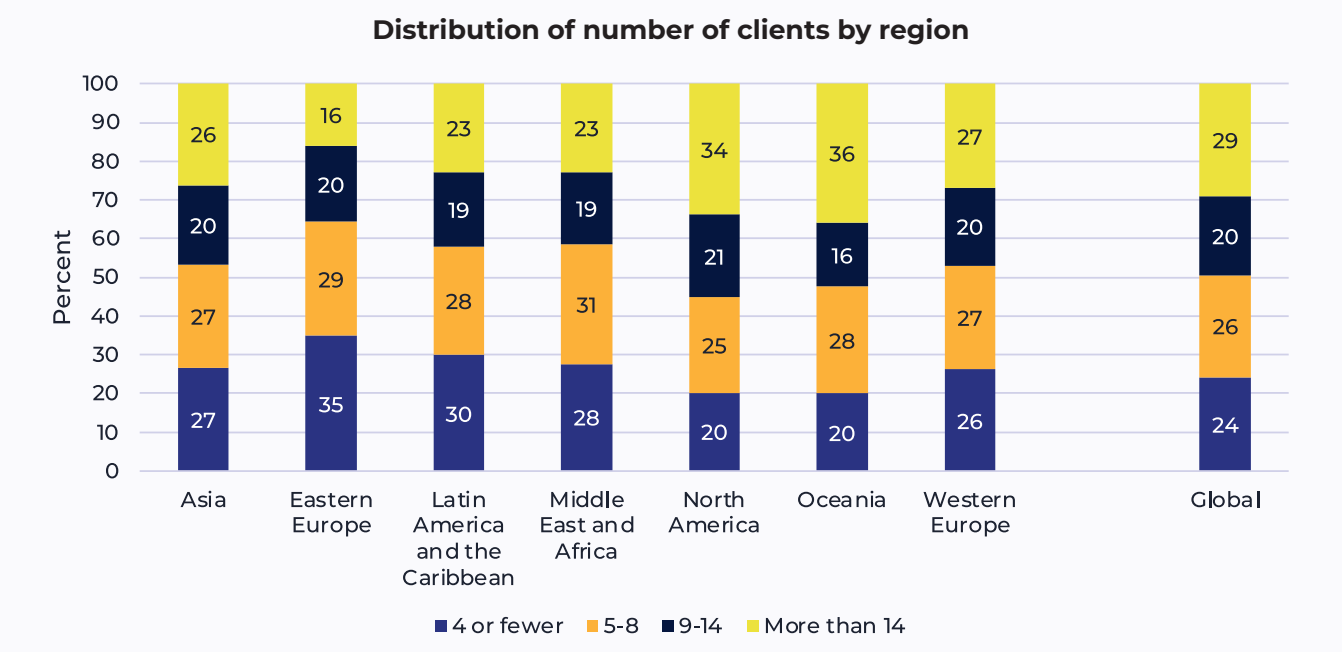
Table 2.10 Number of clients: Average and percent change: 2015-2022

	2015	2019	2022
Asia	9.8	10.5	11.5
Eastern Europe	7.9	9.0	8.4
Latin America and the Caribbean	11.3	13.2	10.2
Middle East and Africa	11.2	11.4	11.0
North America	11.7	12.1	13.5
Oceania	13.3	13.8	13.8
Western Europe	10.4	11.1	11.5
Global	**11.0**	**11.7**	**12.2**

The average number of clients per coach practitioner is typically higher in the more established regions, notably Oceania (13.8) and North America (13.5).

Similar to both 2015 and 2019, the average number of clients in 2022 was lowest in Eastern Europe (8.4).

It should be noted that the average number of clients varies considerably across the population of coach practitioners. In 2022, almost one in four coaches (24%) globally had four clients or fewer whereas 29% had more than 14 clients. A further 26% of coaches had 5-8 clients while one in five (20%) had 9-14 clients. That degree of dispersion in client numbers can be observed in each of the seven world regions.



Weekly Hours Working as a Coach Practitioner

In 2022, coach practitioners spent an average of 11.9 hours per week delivering coaching services. The 2022 average was only slightly lower than the average of 12.1 hours reported for 2019. The -2% reduction should not be considered significant in the context of a sample survey, albeit the percent changes varied somewhat by region, from Oceania's +3% to -13% in the Middle East and Africa.

Average weekly hours working as a coach practitioner ranged from 7.7 in Eastern Europe to 13.3 in North America.

Similar to the patterns seen for hourly fee rates and active clients, the average number of weekly hours working as a coach was typically higher in the more established regions. Overall, coach practitioners in the three established regions of North America, Oceania, and Western Europe averaged 12.8 weekly hours compared with 9.5 weekly hours in the four remaining regions.

Weekly hours working as a coach also varied sharply within the population of coach practitioners. Globally, 14% of coaches worked more than 20 hours per week, 21% worked in the range 11-20 hours per week, 27% worked between 6-10 hours, and 38% worked five or fewer hours a week.

The distribution of weekly hours working as a coach practitioner is highly variable across the regions. For example, the proportion working more than 20 weekly hours ranged from 3% in Eastern Europe to 18% in North America and Oceania.

Table 2.11 Weekly hours working as a coach practitioner: Average and percent change 2019-2022

	2019	2022	% change
Asia	8.7	9.2	6%
Eastern Europe	8.2	7.7	-7%
Latin America and the Caribbean	12.8	11.4	-11%
Middle East and Africa	10.5	9.1	-13%
North America	13.6	13.3	-3%
Oceania	12.9	13.3	3%
Western Europe	11.9	12.0	1%
Global	**12.1**	**11.9**	**-2%**

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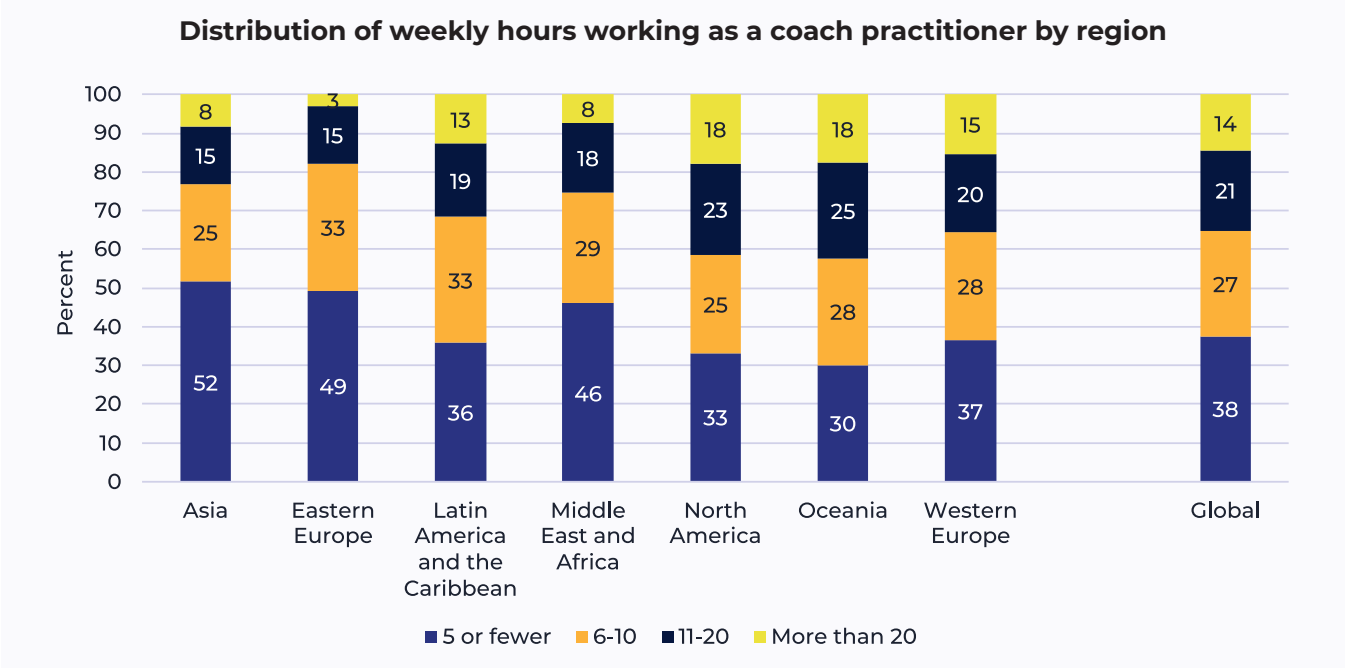

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Revenue/Income Reported per Hour

The fee per one-hour coaching session refers to the amount reported by coaches for time spent with the client. However, coaches also undertake additional supporting activities that do not generate fee income, including preparation, networking, and training.

It is therefore useful to consider hourly revenue/income recovered from coaching; (i.e., annual revenue/income divided by the annualized total number of hours spent working as a coach, including both time with the client and on additional supporting activities).

On that basis, in 2022, the average hourly revenue recovered for all coaches worldwide was an estimated $85 U.S. dollars, equivalent to 35% of the average fee for a one-hour coaching session ($244 USD).

Coach practitioners recovered a higher hourly amount in 2022 compared with 2019. On average, hourly recovery rose by 14% compared to 2019 ($75 USD).

Table 2.13 Hourly revenue recovered

	USD	% of hourly fee reported	% change 2019-2022
Asia	$70	31	-5%
Eastern Europe	$47	34	4%
Latin America and the Caribbean	$38	34	23%
Middle East and Africa	$62	37	-2%
North America	$98	36	12%
Oceania	$85	33	-7%
Western Europe	$84	30	2%
Global	**$85**	**35**	**14%**

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Summary of Revenue Drivers

The key revenue drivers discussed above are summarized in the table below.

Table 2.14 Summary of revenue drivers

	Average fee reported per one-hour session	Average hourly revenue recovered	Hours per week (average)	Active clients currently coaching (average)
	USD	*USD*	*#*	*#*
Asia	$226	$70	9.2	11.5
Eastern Europe	$138	$47	7.7	8.4
Latin America and the Caribbean	$114	$38	11.4	10.2
Middle East and Africa	$165	$62	9.1	11
North America	$272	$98	13.3	13.5
Oceania	$259	$85	13.3	13.8
Western Europe	$277	$84	12	11.5
Global	**$244**	**$85**	**11.9**	**12.2**

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Looking Ahead: Next 12 months

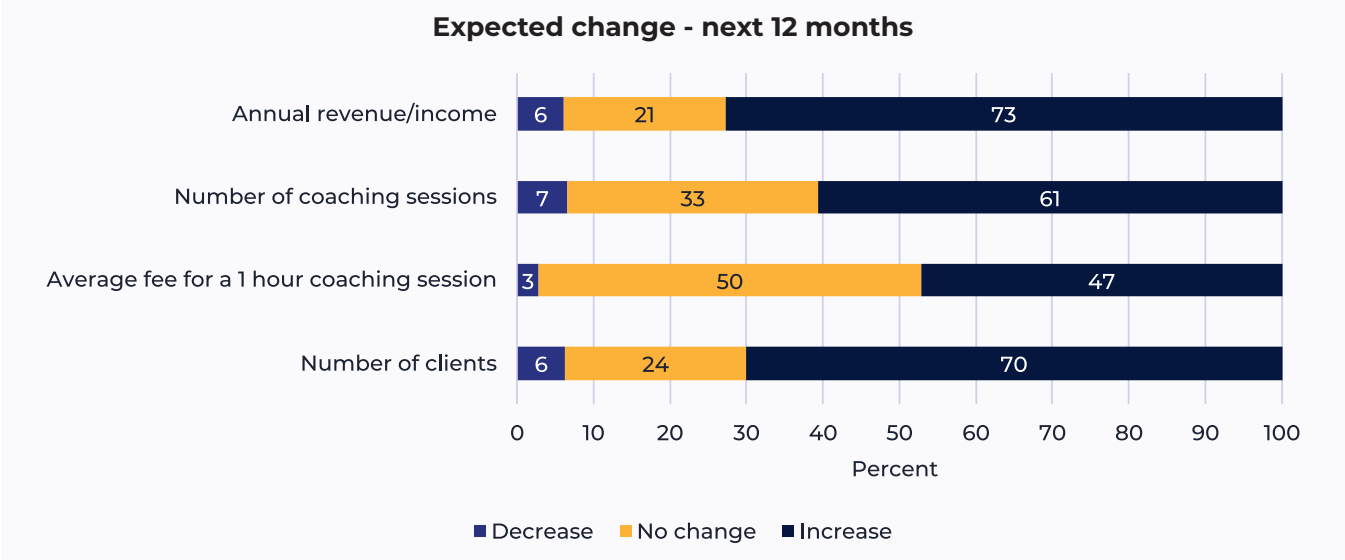
Coach practitioners with current active clients were asked to look ahead in relation to each of four business/practice indicators, as follows:

- Number of clients.
- Average fee for a one-hour coaching session.
- Number of coaching sessions.
- Annual revenue/income.

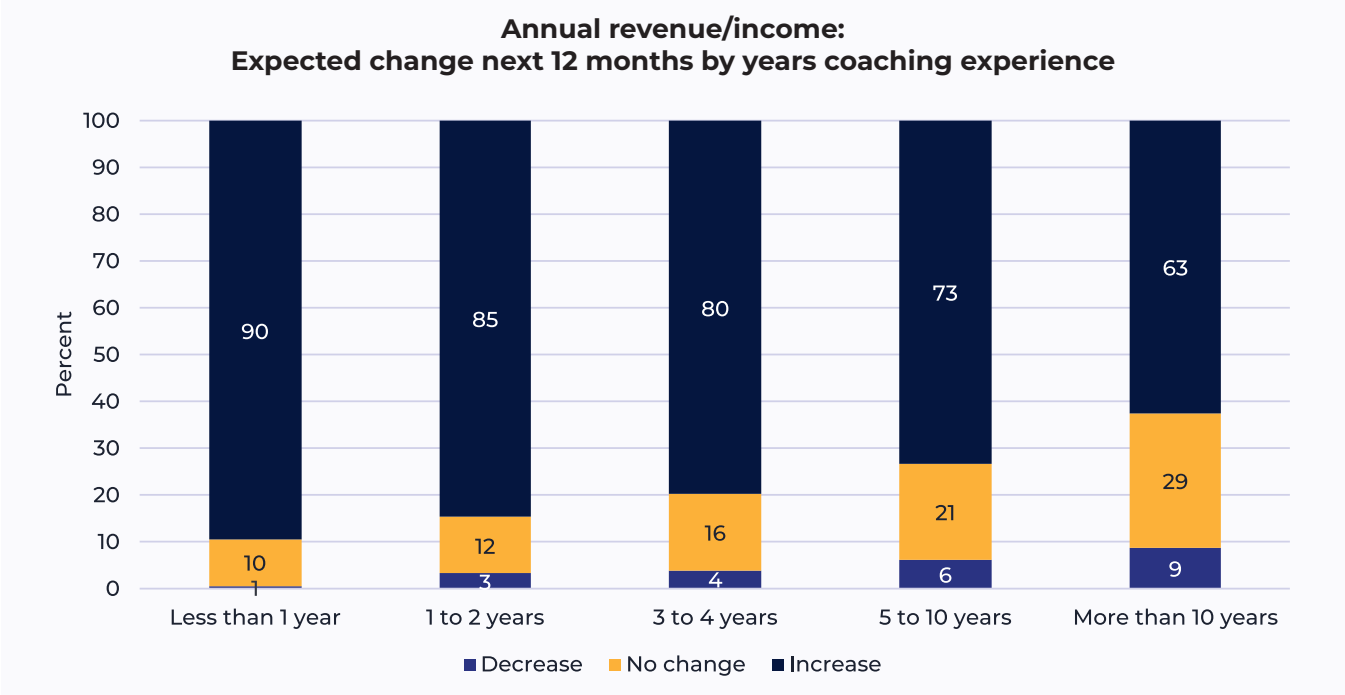
For each of the indicators, coach practitioners were also asked to indicate whether they expected an increase, decrease, or no change over the next 12 months. The survey was undertaken in 2022 and coaches were therefore asked to reflect on their prospects for 2023.

Coach practitioners are optimistic regarding the business outlook for coaching in 2023. Almost three in four (73%) expect to see an increase in their annual revenue/income, driven by a majority of coaches anticipating growth in coaching sessions (61%) and the number of clients (70%).

One in two coach practitioners (50%) expect no change in the average fee for a one-hour session. However, the proportion expecting an increase (47%) vastly outweighs the proportion predicting a decrease (3%).



The level of optimism was highest among coaches in the early stages of their career. Among those with less than one year's experience, 90% said they expected annual revenue/income to increase compared with 63% of those with 10+ years' experience.



Expectations for growth in 2023 were widely shared across the regions. Over three in four coaches in the Middle East and Africa (81%), Latin America and the Caribbean (79%), and Eastern Europe (77%) anticipated an increase in annual revenue/income. In the remaining regions, around seven in 10 coaches expect their revenue/income will go up in 2023.

Table 2.15 The regional pattern in expectations for 2023

	Percent expecting an increase over next 12 months in:			
	Number of clients (%)	*Average fee for a one-hour coaching session (%)*	*Number of coaching sessions (%)*	*Annual revenue / income (%)*
Asia	74	45	69	75
Eastern Europe	73	60	70	77
Latin America and the Caribbean	76	52	64	79
Middle East and Africa	79	53	72	81
North America	69	48	58	73
Oceania	70	43	58	72
Western Europe	67	42	56	68
Global	**70**	**47**	**61**	**73**

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Key Points Summary

The following are the key points from the analysis of the size and scope of the profession:

- Notwithstanding the COVID-19 pandemic, between 2019 and 2022, the coaching profession continued to expand at a robust pace. In 2022, the estimated number of coach practitioners exceeded 100,000 for the first time, reaching **109,200**, representing a 54% increase on the 2019 global estimate.
- The number of coach practitioners grew in all regions, most notably in the emerging regions of Asia (+86%), the Middle East and Africa (+74%), and Eastern Europe (+59%).
- With an estimated 54% increase, Latin America and the Caribbean grew in line with the global average.
- The more established regions also registered solid growth rates, from 42% in Oceania to 51% in Western Europe, with North America posting a 47% expansion.
- Over nine in 10 coach practitioners (91%) said they currently have active clients, giving an estimated **99,100 active coach practitioners**, representing a 55% increase compared with the position in 2019.
- In 2022, active coach practitioners generated an estimated annual revenue/income from coaching of **$4.564 billion U.S. dollars**, representing a 60% increase over the 2019 estimate.
- The estimated 55% increase in active coach practitioners was the main factor driving the increase in total annual revenue from coaching.
- In addition, the average annual revenue/income from coaching is estimated to have risen by 12% between 2019 and 2022, to **$52,800 U.S. dollars**.
- Reflecting the diversity of coaches, annual revenue/income from coaching varies widely. Globally, more than one in two coaches (53%) reported less than $30,000 annual revenue/income from coaching.
- The overall average fee per one-hour coaching session in 2022 was **$244 U.S. dollars**, representing a 9% increase compared with 2019.
- Average fees reported per one-hour coaching session vary widely, ranging from $277 U.S. dollars in Western Europe to $114 U.S. dollars in Latin America and the Caribbean.
- In 2022, the average active coach practitioner had **12.2 clients**, representing a 4% increase on the 2019 average (11.7 clients).
- In 2022, coach practitioners spent an average of **11.9 hours per week** working as a coach, only slightly lower (2%) than the average of 12.1 hours reported for 2019.
- Coach practitioners are optimistic regarding the business outlook for coaching in 2023. Almost three in four (73%) expect to see an increase in their annual revenue/income, driven by a majority of coaches anticipating growth in coaching sessions (61%) and the number of clients (70%).

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Section 3:
Summary Business Indicators

Section 3 Summary Business Indicators

Introduction

This section presents further detail and analysis of the key business indicators, (i.e., average annual revenue/income from coaching, fee per one-hour coaching session, clients, and weekly hours).

Annual revenue/income from coaching varies with the fees that coaches charge per one-hour coaching session, the number of active clients, and the hours that they work delivering coaching services. These are the drivers of income/revenue from coaching.

The focus in this section is on the relationships between those business indicators and the attributes of coach practitioners, the services that they offer, and the clients that they serve.

The linkages with the key business indicators are discussed in this section under the following headings:

- Demographic profile of coaches.
- Coaching services.
- The client.
- Memberships and Credentials

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Summary Business Indicators: Demographic Profile of Coaches

According to the table below, the key business indicators vary with the demographic attributes of the coach practitioner, (i.e., years of coaching experience, age, and gender).

Table 3.1 Summary business indicators: Demographic profile

		Annual revenue	Reported one-hour fee	Clients	Hours
		USD	*USD*	*#*	*#*
Experience	Less than 1 year	$13,900	$150	5	6
	1-2 years	$20,400	$170	7	7
	3-4 years	$34,900	$190	11	10
	5-10 years	$51,100	$240	13	12
	More than 10 years	$76,900	$310	15	15
Age	34 years and under	$29,200	$160	9	10
	35-44 years	$41,300	$200	11	11
	45-54 years	$49,100	$240	12	12
	55-64 years	$60,000	$270	13	12
	65 years and over	$60,100	$260	12	12
Generations	Generation Z (17-25)/ Millennials (26-40)	$36,600	$180	11	11
	Generation X (41-55)	$48,800	$240	12	12
	Baby Boomers (56-74)/The Greatest Generation (75+)	$60,200	$270	13	12
Gender	Female	$49,300	$240	12	12
	Male	$61,300	$260	12	12

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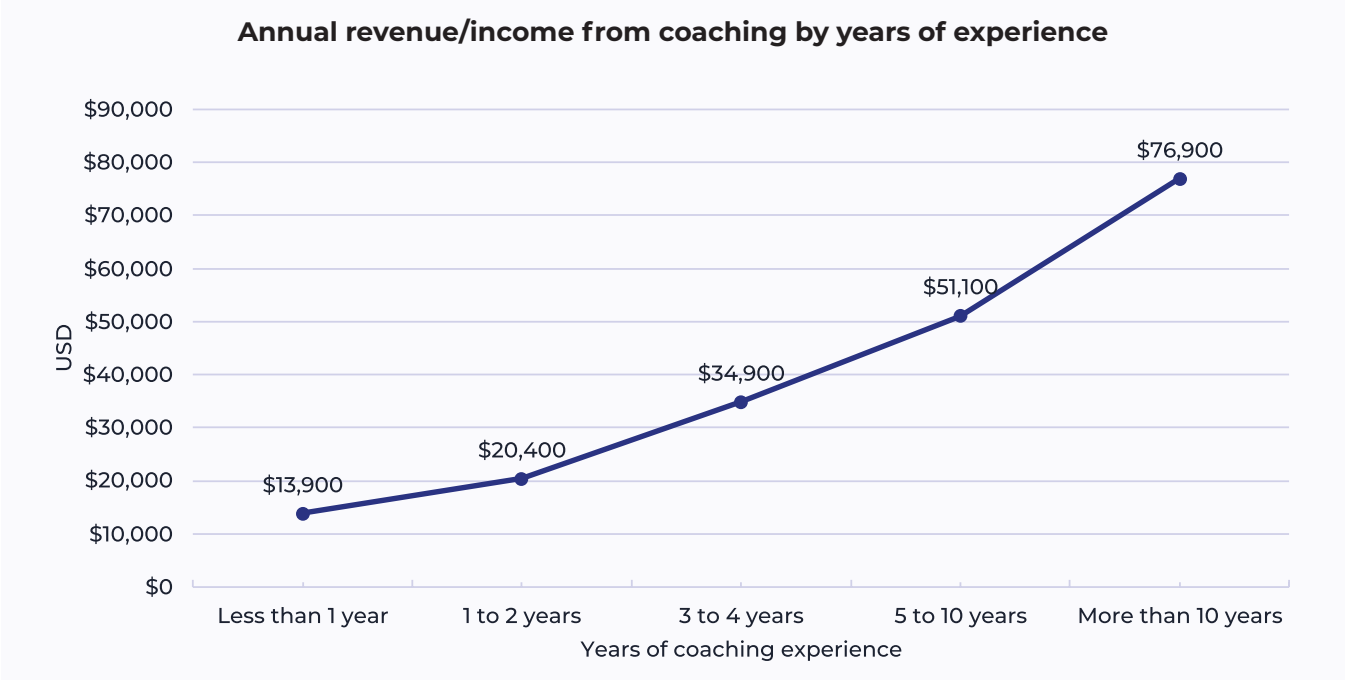
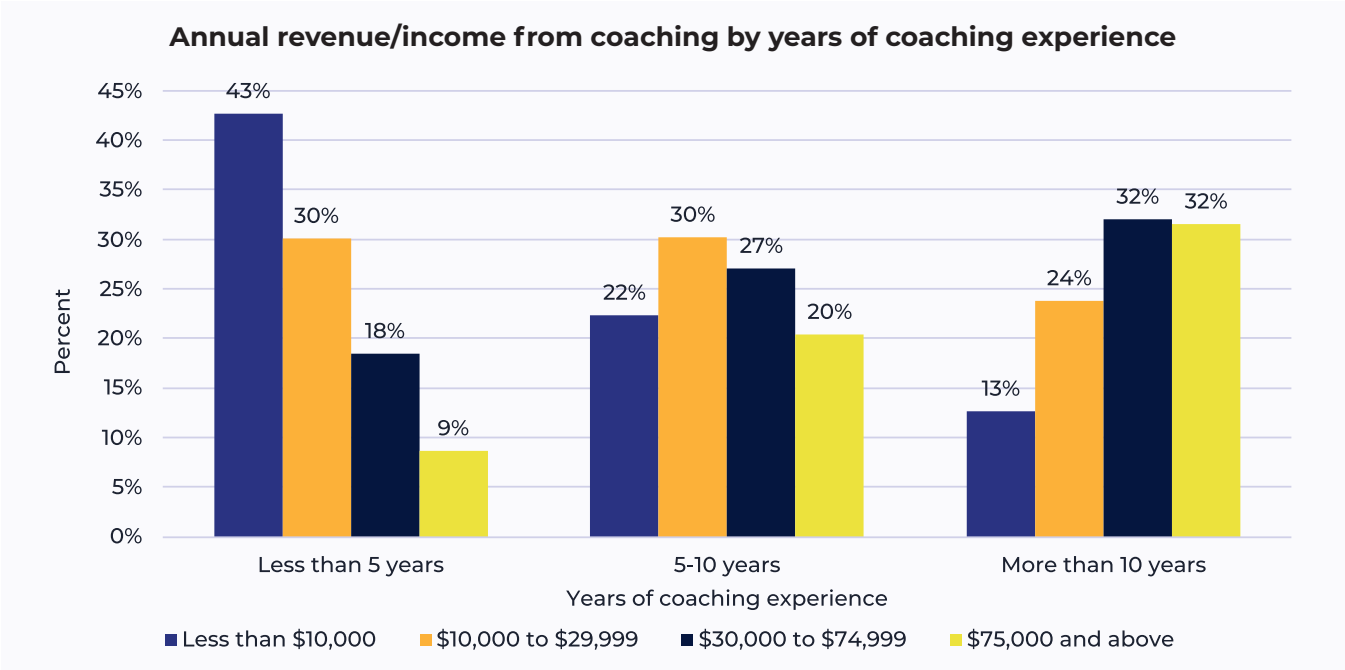
Among the demographic attributes, years of coaching experience exerts the strongest influence on each of the four business indicators.

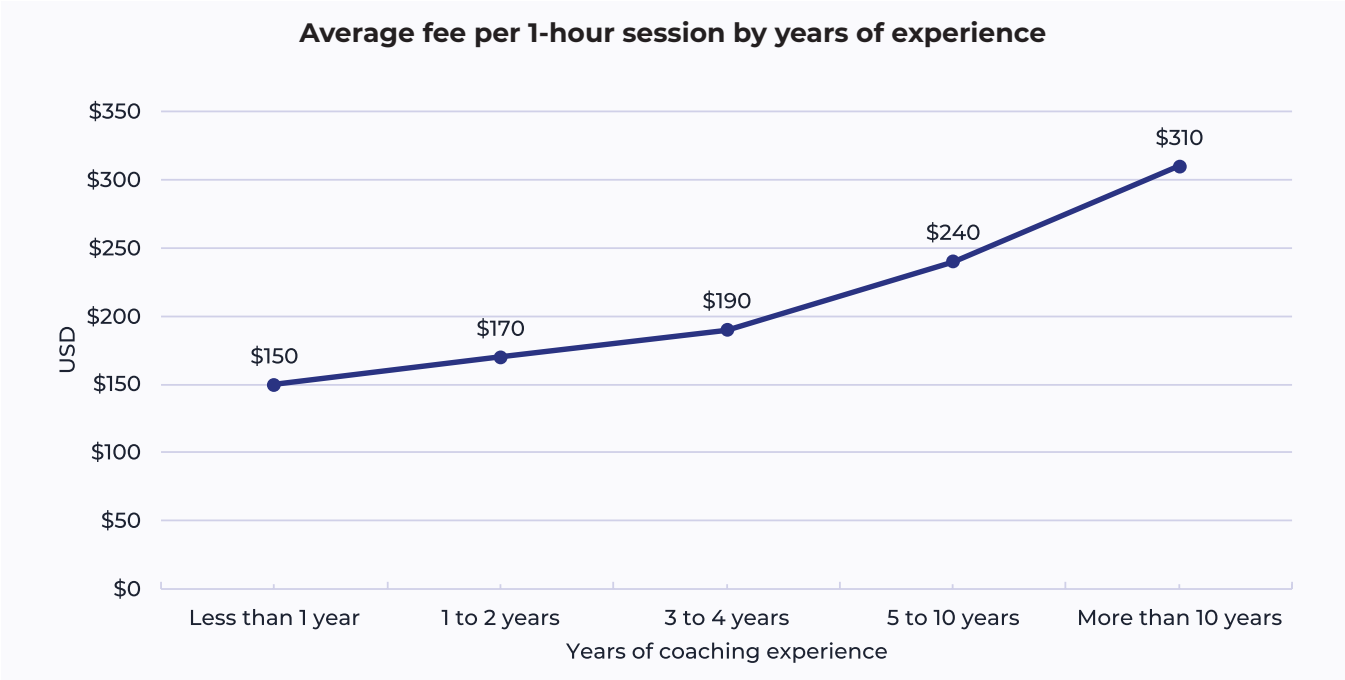
Annual revenue/income from coaching ranges from an average of $13,900 U.S. dollars among coach practitioners with less than one year of experience to $76,900 U.S. dollars for those with more than 10 years' experience.



While average revenue is positively linked to years of coaching experience, there is considerable dispersion around the average within each experience band. For example, the proportion reporting revenue/income under $10,000 ranges from 43% among coaches with less than five years' experience to 13% of those with more than 10 years' experience.

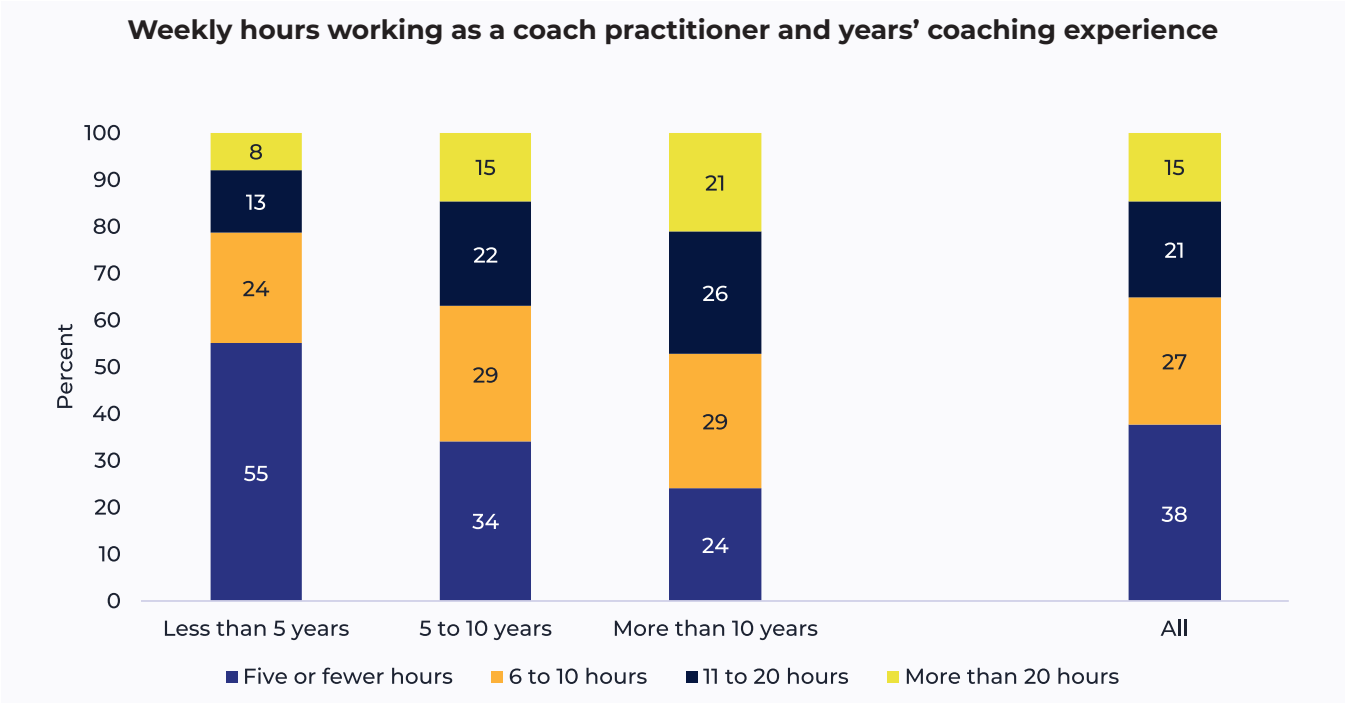


The average fee per one-hour session is also positively linked to years of coaching experience, rising from an average of $150 U.S. dollars among coaches with less than one year's experience to $310 U.S. dollars among coaches with more than 10 years of experience.



Similarly, the average number of clients and weekly hours spent coaching vary strongly with years of experience.

While average weekly hours working as a coach practitioner increases with years of experience, it is important to note that the average varies widely across coach practitioners. Almost two in four (38%) work less than five hours per week as a coach practitioner, ranging from 55% of those with less than five years' experience to 24% of coaches with more than 10 years' experience.



The business indicators also vary with the age of the coach, whether classified by age groups or age generations. Thus, average annual revenue/income from coaching generally increases with age. That relationship primarily reflects the overlap between years of coaching experience and the age of the coach. For example, the proportion of coaches with more than 10 years of experience rises from 4% among Millennials (aged 26-40 years) to 46% of Baby Boomers (aged 56-74 years). Further detail on the overlap between years of experience and age of the coach can be found in Section 4.

Female coach practitioners reported an average annual income/revenue from coaching ($49,300 USD) that was one-fifth (20%) lower than the average for male coaches ($61,300 USD). The differential is unchanged from the 2019 survey, albeit narrower than the gap reported in the 2015 (29%) and 2011 (32%) surveys. The revenue gap between male and female coaches is likely to reflect a range of factors and a fuller explanation is beyond the scope of this study.

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Summary Business Indicators: Coaching Services

The business indicators vary with the services that coaches offer. Most notably, annual revenue/income and the fee per one-hour session differ according to the main area of coaching.

Coach practitioners with a business coaching specialty tend to have higher levels of revenue/income from coaching compared with non-business coaches, by a margin of $63,600 to $28,900 U.S. dollars.

The higher average revenue/income accruing to business coaches also reflects their higher fees per one-hour session; an average of $280 versus the $160 U.S. dollars average quoted by non-business coaches.

On average, business coaches report larger numbers of clients and more hours working as a coach compared with non-business coaches. Though, those differences are less significant than the variations in fees per one-hour session and annual revenue/income.

Table 3.2 Summary business indicators: Coaching services

		Annual revenue	Reported one-hour fee	Clients	Hours
		USD	*USD*	*#*	*#*
Internal/ external	External	$54,900	$250	12	12
	Internal	$55,300	$190	14	10
	Both	$40,300	$200	12	10
Main area of coaching	Business	$63,600	$280	13	13
	Leadership	$59,300	$270	13	12
	Business/ organizations	$54,100	$240	12	13
	Executive	$79,300	$340	13	13
	Small business	$58,400	$240	10	13
	Non-business Specialty	$28,900	$160	11	10
	Life, vision & enhancement	$21,600	$150	9	9
	Career	$27,800	$170	11	10
	Other non-business	$36,200	$170	13	12
Additional services offered	None	$50,200	$210	11	11
	One	$46,400	$230	11	11
	Two	$50,400	$240	12	12
	Three	$56,200	$250	12	12
	Four or more	$55,000	$250	13	13

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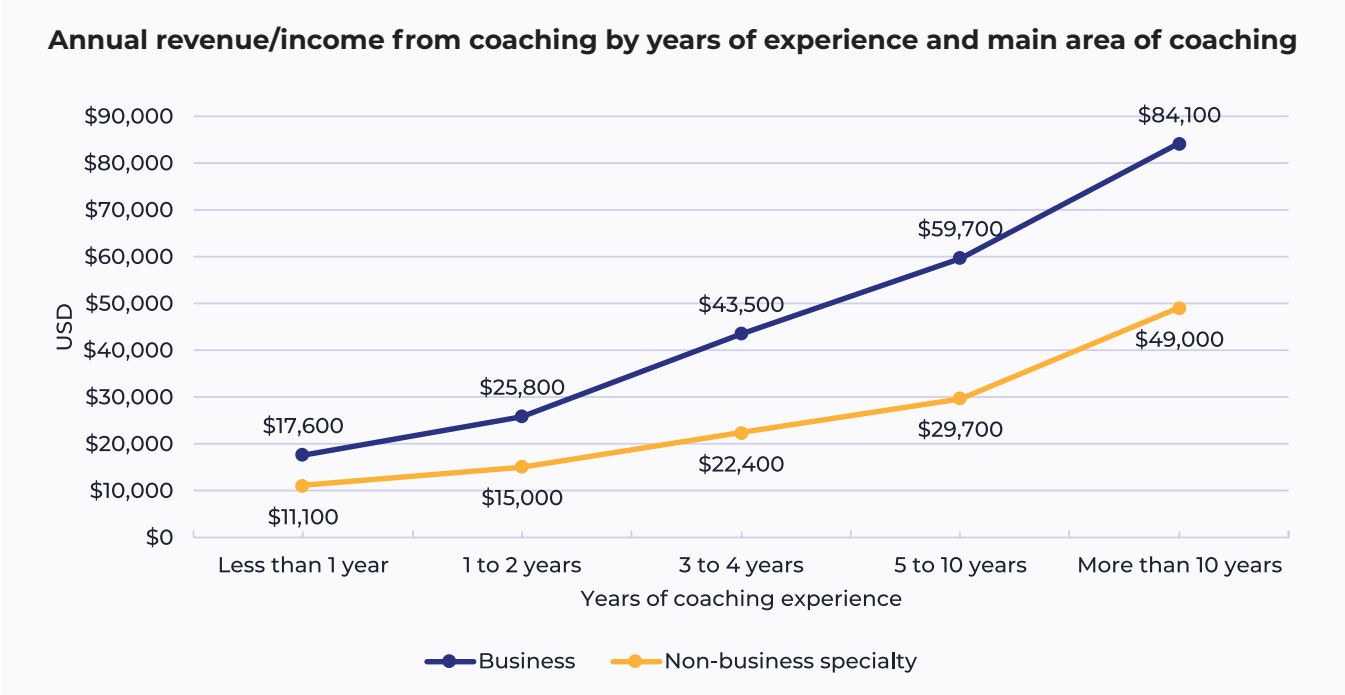
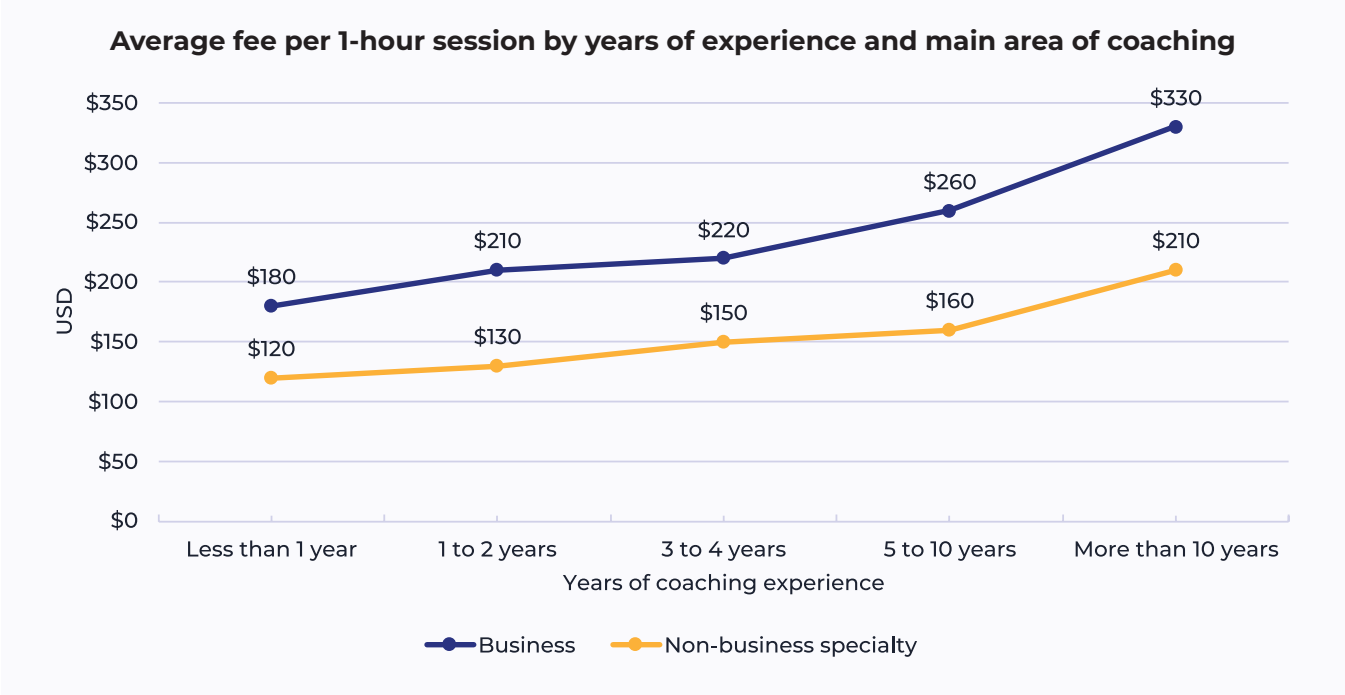
Main coaching specialty is also linked to years of coaching experience. As shown in the chart below, for both business and non-business coaching specialties, annual revenue/income from coaching increases with years of experience. However, within each coaching experience band, business coaches earn more than non-business coaches. For example, business coaches with 3-4 years' experience generate an annual average revenue/income of $43,500 compared to $22,400 U.S. dollars for coaches practitioners with a non-business specialty.



Reported fees per one-hour session also rise with coaching experience in both business and non-business specialties. Again, the gap between business and non-business specialties can be observed at each level of coaching experience. For example, the average fee for a one-hour session is $260 U.S. dollars for business coaches with 5-to-10 years' experience compared with $160 U.S. dollars among coaches with a non-business specialty.



It can also be noted that the main coaching specialty overlaps with years of coaching experience. In particular, more experienced coaches are more likely to have a business coaching specialty compared with those at an earlier stage in their coaching experience. For example, the proportion of coach practitioners with business coaching as a main specialty ranges from 42% of coach practitioners with less than one year of experience to 78% of those coaching for 10 or more years (see also Section 4). As business coaching generates higher average revenue/income levels, that contrast is part of the reason for the relationship between years of experience and annual revenue/income from coaching.

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Summary Business Indicators: The Client

The position occupied by clients who receive coaching has a strong effect on the reported fee for a one-hour session, ranging from $360 U.S dollars among coaches for whom the majority of clients are executives to $150 U.S. dollars among coaches where the majority of their work is with personal clients.

The contrasts in the average fee per one-hour session are directly reflected in average annual revenue/income from coaching. Thus, annual revenue/income from coaching is significantly higher for those who mainly coach executives ($87,700 USD) than for those who mainly coach personal clients ($23,800 USD).

Table 3.3 Summary business indicators: The client

		Annual revenue	Reported one-hour fee	Clients	Hours
		USD	*USD*	*#*	*#*
Position (majority of clients)	Executive (e.g., CEO, CFO, etc.)	$87,700	$360	13	14
	Business owner/ entrepreneur	$49,900	$240	11	13
	Manager	$42,900	$210	13	11
	Team leader	$44,100	$210	12	11
	Individual contributor	$30,700	$160	12	10
	Personal client	$23,800	$150	9	10
	Other	$52,100	$220	16	14
Sponsored	No clients sponsored	$28,100	$180	7	9
	1%-50% sponsored	$42,400	$230	11	12
	51%-95% sponsored	$63,800	$260	16	14
	96%+ sponsored	$67,700	$290	13	12
	Other non-business	$36,200	$170	13	12
Additional services offered	None	$50,200	$210	11	11
	One	$46,400	$230	11	11
	Two	$50,400	$240	12	12
	Three	$56,200	$250	12	12
	Four or more	$55,000	$250	13	13

Hourly fees and annual revenues are also positively linked to the proportion of a coach's clients who are sponsored (i.e., coaching is paid for by someone other than the client). The higher the sponsored client share, the higher the hourly fee and annual revenue/income from coaching.

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The higher fees and revenue/income received by coaches with mostly sponsored clients partly reflects the nature of the client receiving coaching.

Sponsored clients are also more likely to occur in a business environment. Among business coaches, 69% said that more than half of their clients are sponsored. Conversely, among coaches with a non-business coaching specialty, 68% said that fewer than half their clients are sponsored, including 41% who said none of their clients are sponsored.

These linkages, in turn, help to explain the higher fees and annual revenues earned by more experienced coaches and those with a business coaching specialty.

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Summary Business Indicators: Training and Credentialing

Respondents who were members of one or more professional associations reported higher average revenue/income from coaching ($53,000 USD) compared to those who are not currently members ($51,200 USD).

Those saying they hold one or more credentials from a professional association reported higher average annual revenue/income from coaching compared to those without a credential ($53,100 compared to $50,800 USD).

Table 3.4 Summary business indicators: Memberships and credentials

		Annual revenue	Reported one-hour fee	Clients	Hours
		USD	*USD*	*#*	*#*
Membership	Any	$53,000	$240	12	12
	None	$51,200	$250	11	11
Credentials	Any	$53,100	$240	13	12
	None	$50,800	$250	10	10

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Key Points Summary

The following are the key points from the survey findings for the business indicators (annual revenue/income from coaching, fee per one-hour session, clients, and hours):

- On average, years of coaching experience is positively linked to the drivers of coaching revenue. Typically, the more experienced the coach, the higher the reported average fee per one-hour coaching session, the greater the number of clients, and the more weekly hours spent working as a coach.
- Consequently, the more experienced coaches have higher annual income/revenue from coaching.
- Coaches specializing in business coaching tend to have above-average revenue/income from coaching, primarily reflecting a higher average level of fees per one-hour coaching session.
- The position held by the coach's clients exerts an important influence on fees per one-hour session, with those coaches who mainly serve executives commanding the highest hourly fees and earning the highest annual revenue/income from coaching.
- Revenues and fees are positively related to the proportion of clients whose coaching is sponsored (i.e., coaching is paid for by someone other than the client). On average, the higher the proportion of clients who are sponsored, the higher the hourly fee and annual revenue/income from coaching.
- The factors linked to annual revenue/income and reported fees per one-hour session tend to overlap.
- For example, the proportion of clients who are sponsored tends to be higher among those with a business coaching specialty compared with non-business specialties.
- Similarly, more experienced coaches are also more likely to have a business coaching specialty. They are also more likely to have a majority of clients who are in an executive position.
- These linkages, in turn, help to explain the higher fees and annual revenues earned by more experienced coaches and those with a business coaching specialty.

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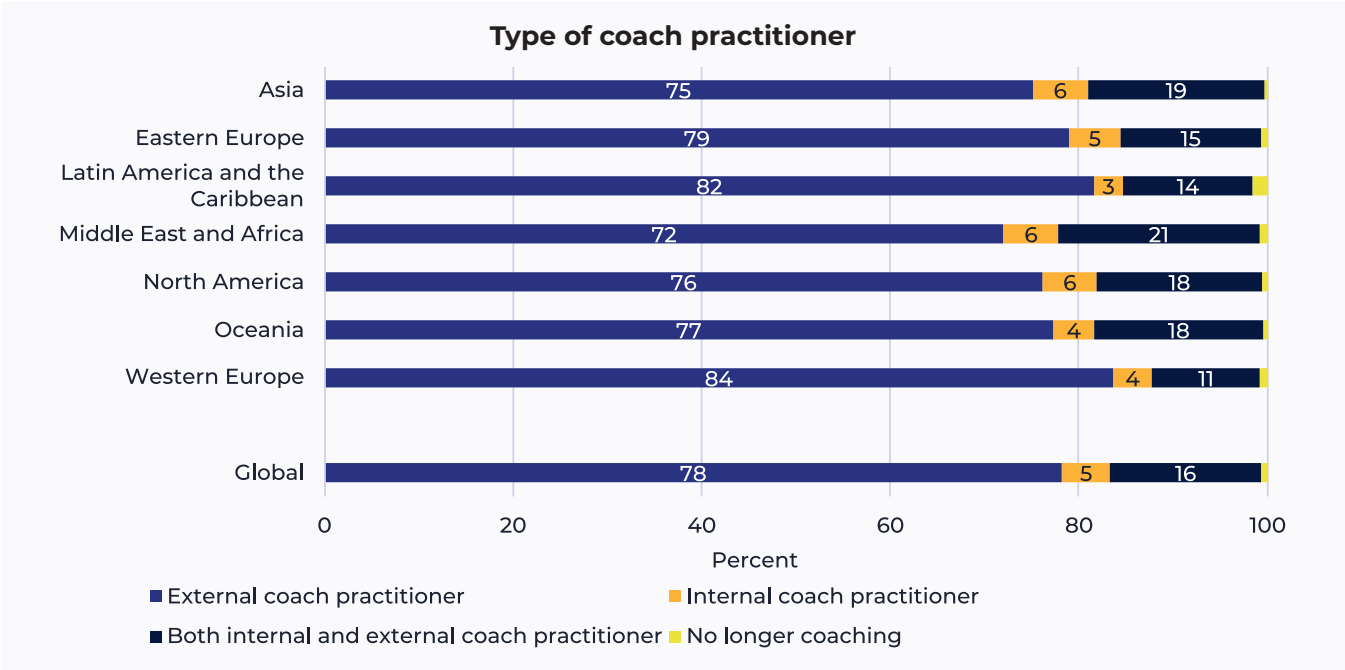
Section 4:
Coach Practitioners

Section 4 Coach Practitioners

Introduction

This section presents a profile of coach practitioners, under the following headings:

- Demographics.
- Coaching services.
- The client.
- Memberships and credentials.



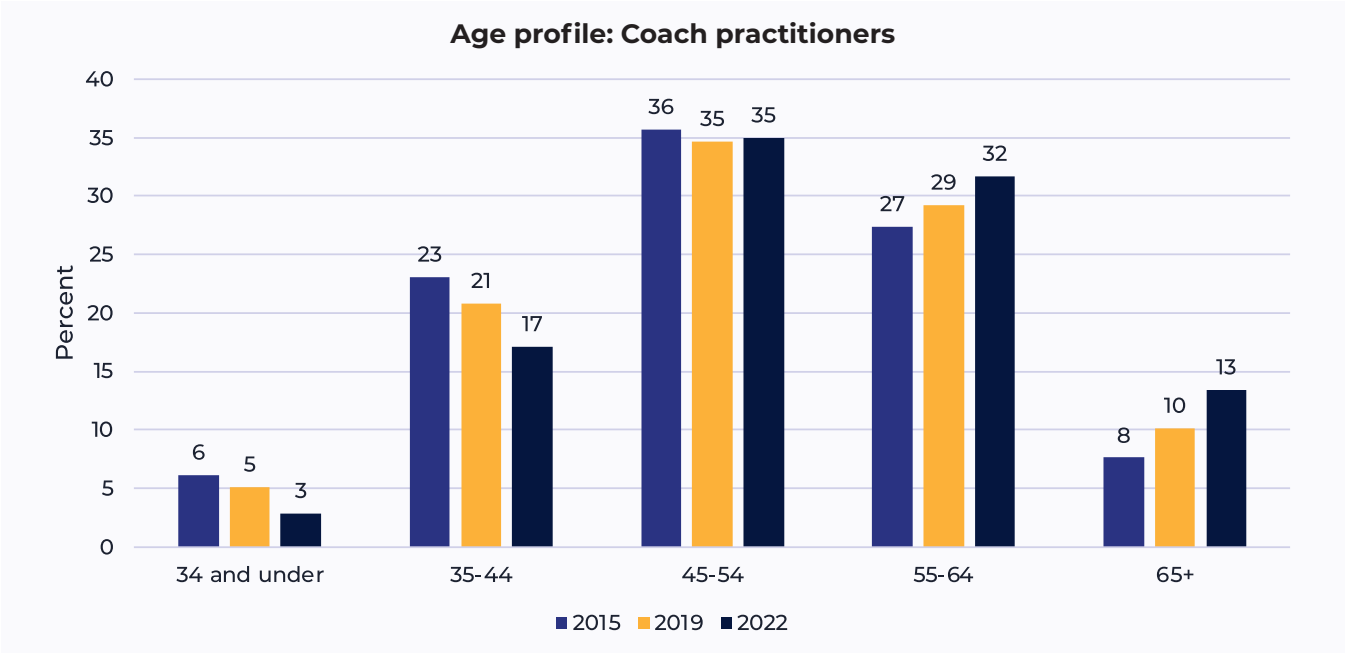
Demographics

The following topics are discussed with reference to the demographics of coach practitioners:

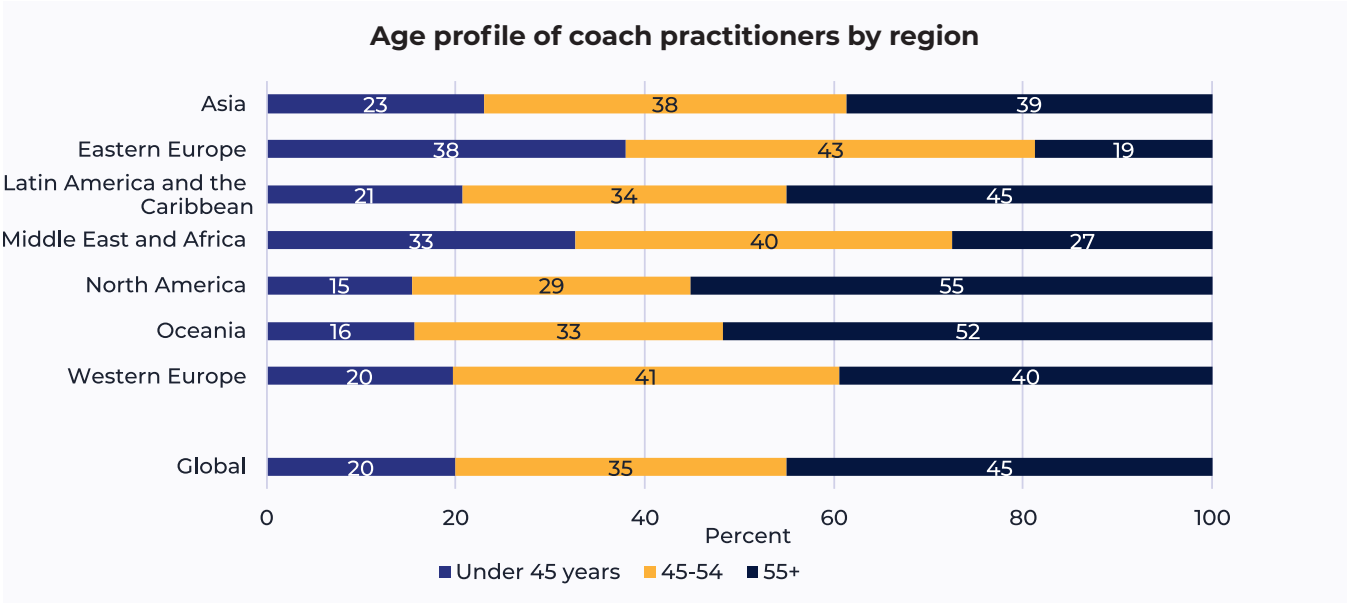
- Age.
- Gender.
- Education.

Age

Between 2019 and 2022, the proportion of coaches aged 45 and over rose from 74% to 80%.



The age profile of coaches is more skewed towards the younger age groups in the emerging regions, most notably in Eastern Europe where 38% of coaches are aged 44 or under, compared with the global average of 20%. By contrast, in North America, over one in two coaches (55%) are aged 55 years or over.

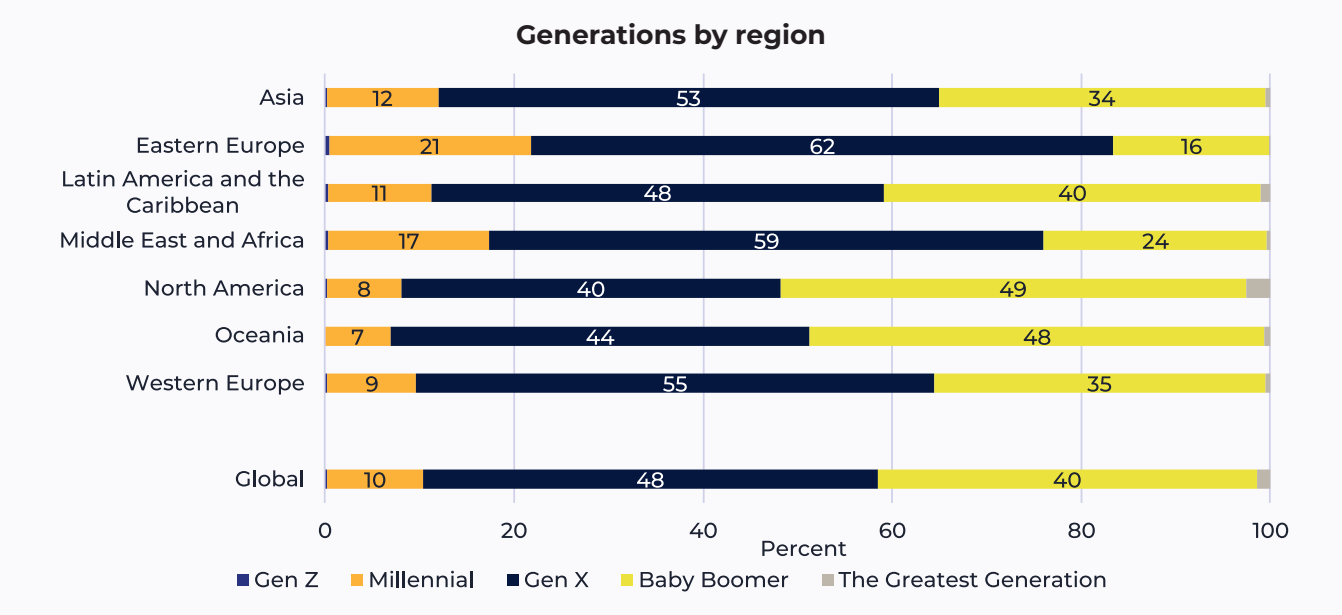


Generations by year

Generations	Birth years
Generation Z	1997-2002
Milennials	1982-1996
Generation X	1965-1981
Baby Boomers	1946-1964
Greatest Generation	1945 and earlier

Globally, almost one in two coach practitioners (48%) are in the Generation X age cohort, ranging from 40% in North America to 62% in Eastern Europe. The proportion of coach practitioners who are Baby Boomers ranges from 16% in Eastern Europe to 49% in North America. North America and Oceania are the only regions where Baby Boomers outnumber Generation X coaches. Globally, Millennials account for one in 10 coach practitioners, ranging from 21% in Eastern Europe to 8% in North America and 7% in Oceania.

Very few coach practitioners (1.5%) were part of the Greatest Generation. At the other end of the age spectrum, even fewer coaches (0.2%) said they were part of Generation Z. In this section, therefore, detailed analysis by age group focuses primarily on the three main age generation groups within the population of coach practitioners; results for the Greatest Generation are included where the base number is sufficient. Generation Z coaches are included along with Millennials for a complete picture, albeit they are very few in number (n=30).



Gender

For the 2022 survey, respondents were asked to say if they consider themselves female, male, or gender neutral/gender fluid. The majority of coach practitioners (71.7%) said they are female, with 27.8% male, and 0.5% gender neutral/fluid. Due to the low base number reporting as gender neutral/fluid, statistical analyzes of gender in this section are focused on the female/male split. That is not at all to diminish the importance of including those who consider themselves gender neutral/fluid; their views and perspectives are included in the reporting on the survey results.

The female share has been edging steadily upward. In 2015, the female share stood at 67%, rising to 70% in 2019 and increasing by a further two percentage points compared to 72% in 2022.

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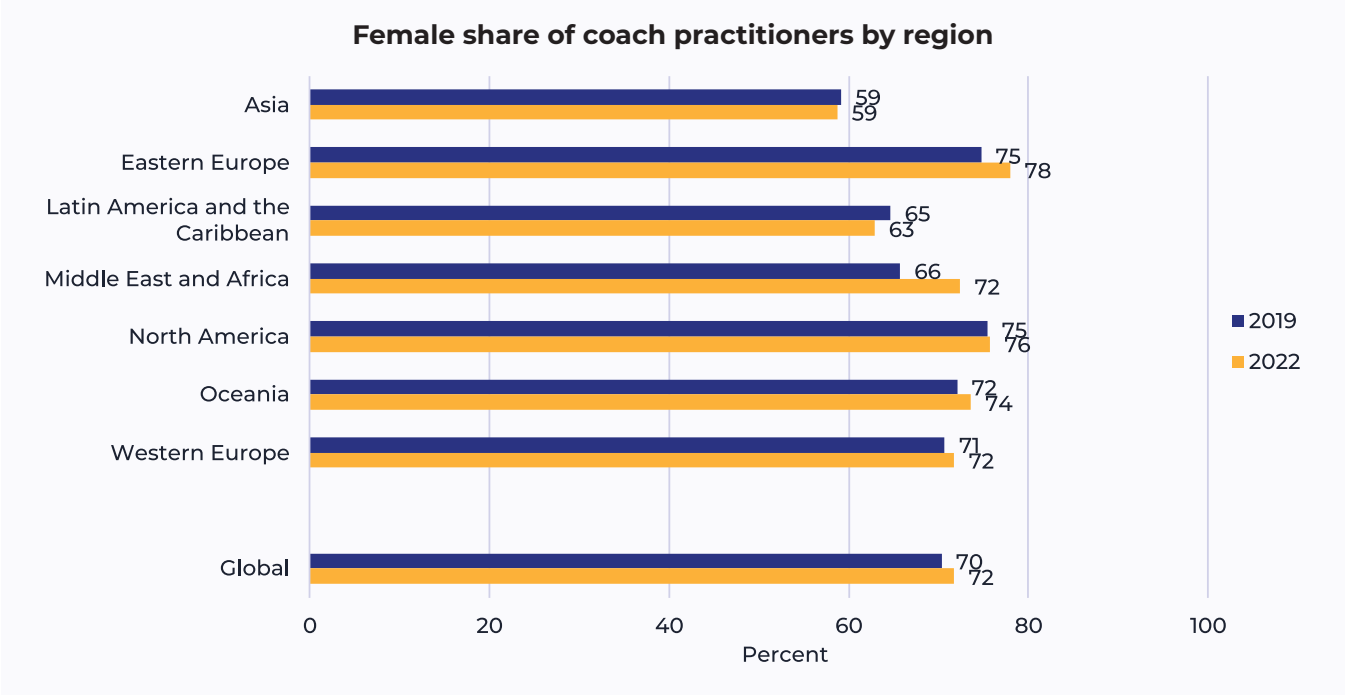
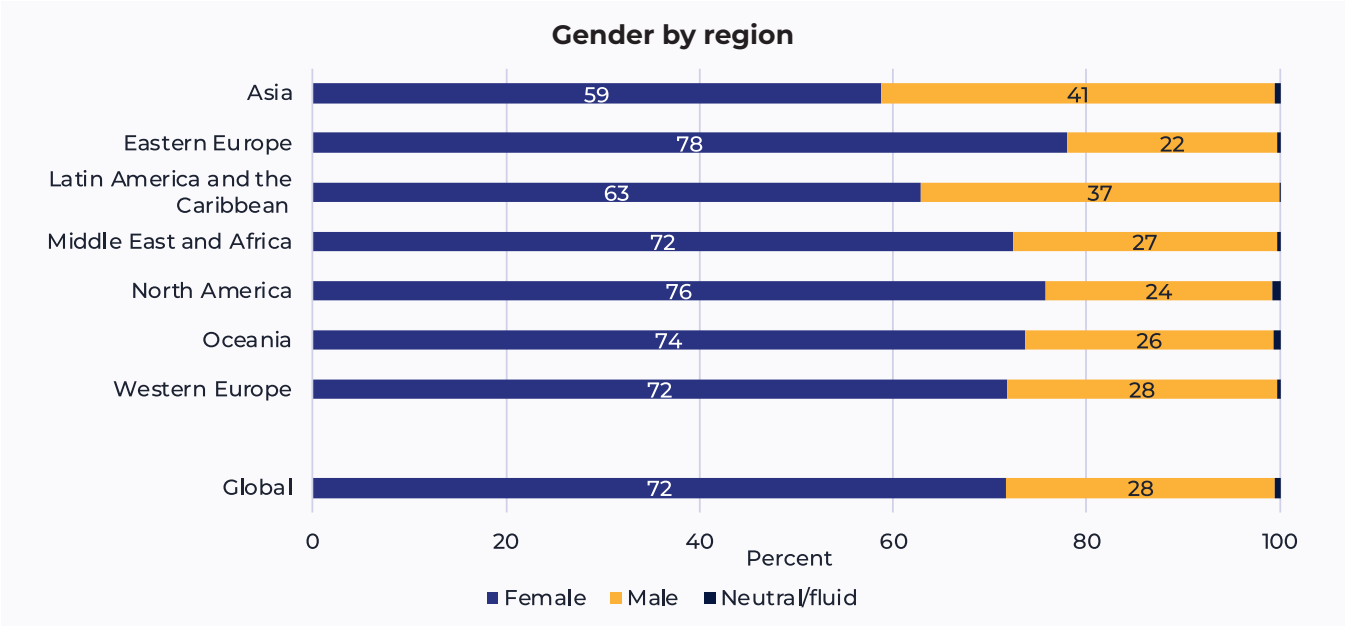
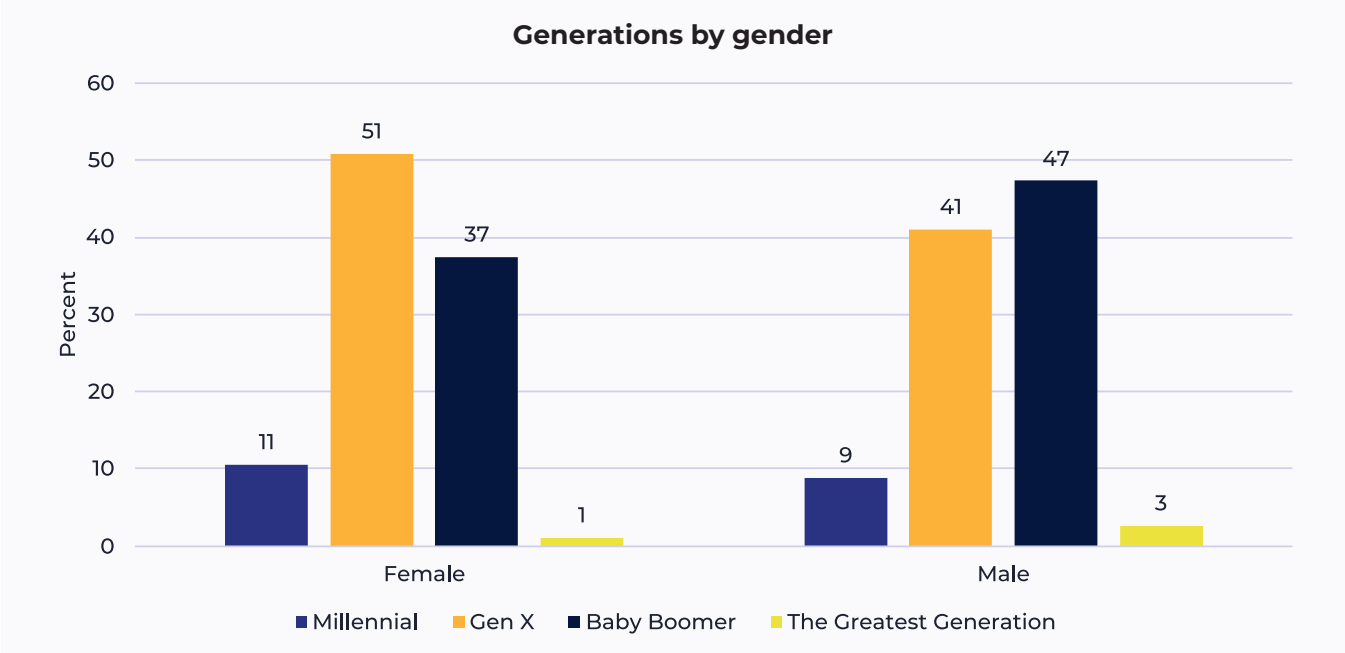
Compared with 2019, the largest increase in the female share was in the Middle East and Africa, up from 66% to 72% in 2022.



The female share of coach practitioners ranges from 59% in Asia to 78% in Eastern Europe.

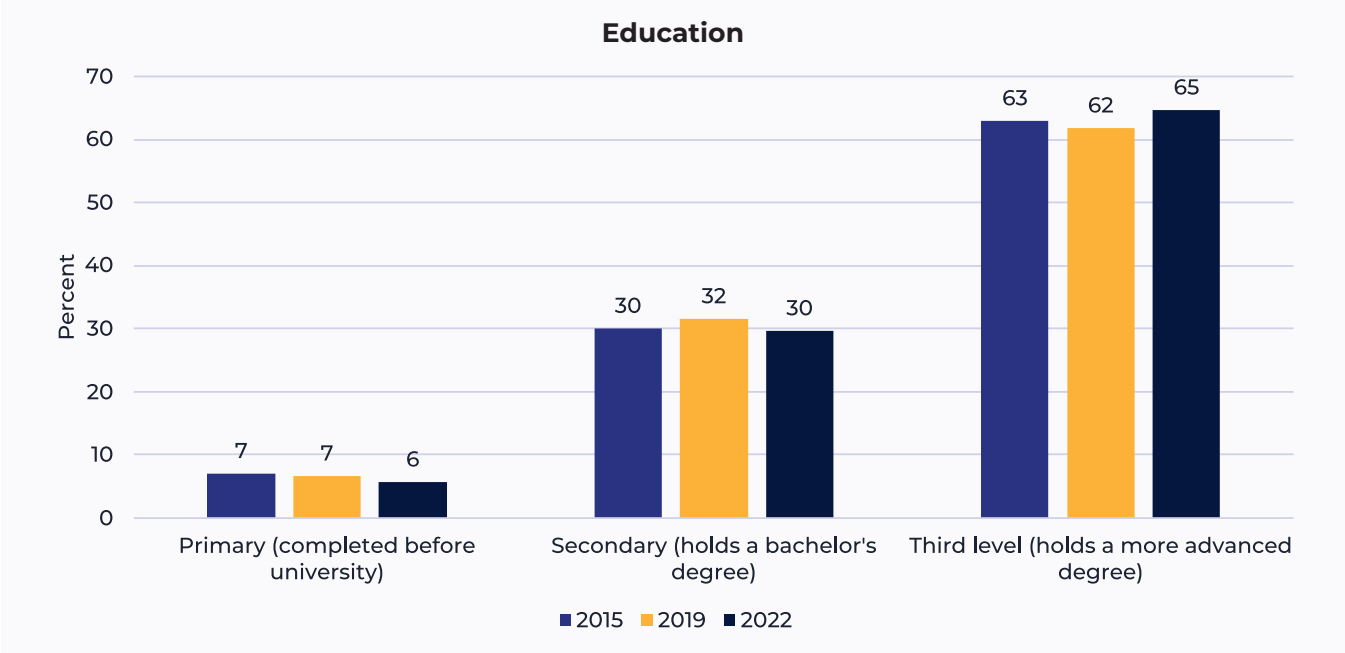


Among female coaches, a little over one in two (51%) are in the Generation X cohort. By contrast, among male coaches, Baby Boomers outnumber Generation X coaches, by a margin of 47% to 41%.

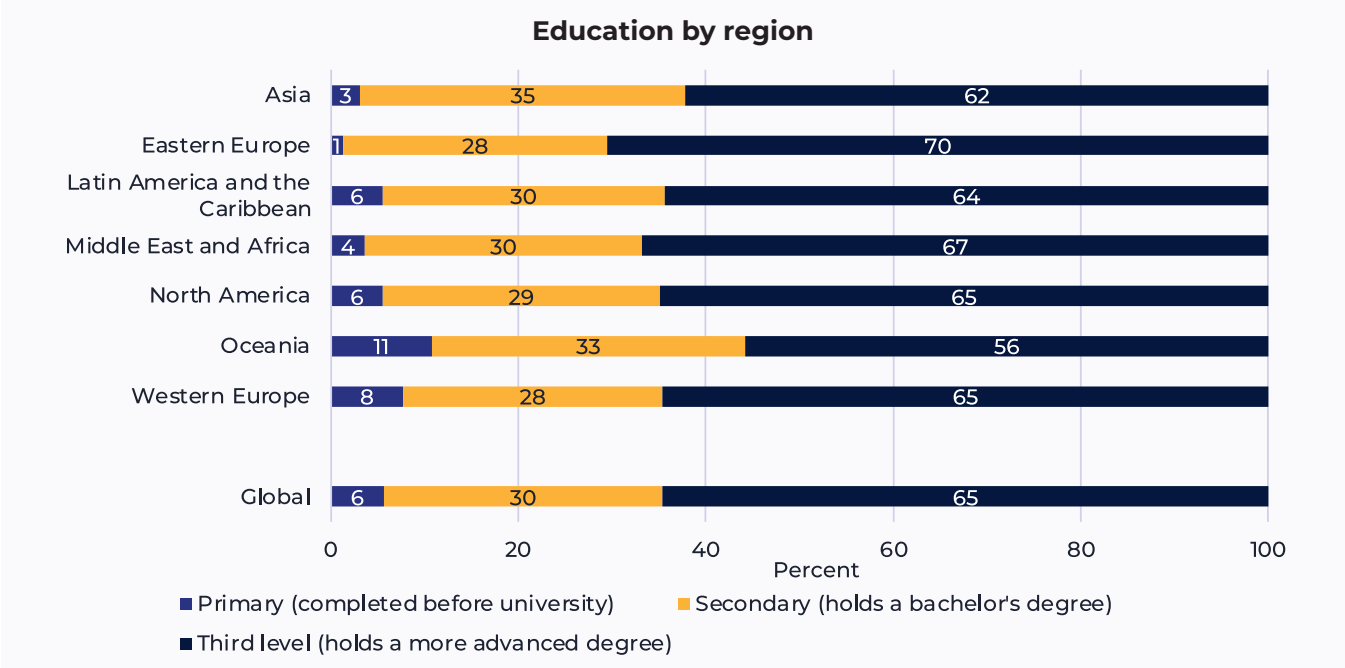


Education

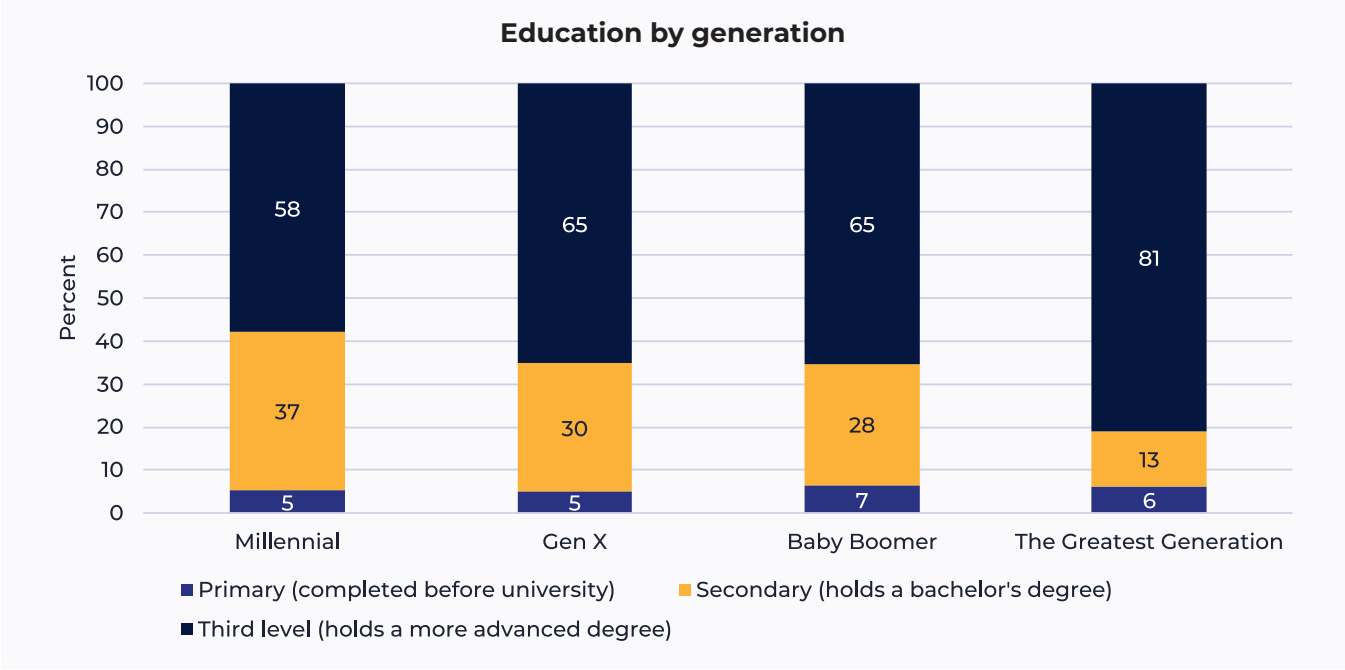
The vast majority of coaches hold a degree-level qualification or higher, including 30% with a bachelor's degree and 65% with a more advanced degree. The proportion holding a more advanced degree in 2022 was three percentage points higher than in 2019 (62%).



The proportion of coach practitioners with a more advanced degree is highest in Eastern Europe (70%) and lowest in Oceania (56%). The regional pattern in 2022 is very similar to the results from both the 2015 and 2019 surveys.



The distribution of educational qualifications hardly varies between Generation X and Baby Boomers. In both generation groups, 65% of coach practitioners hold a more advanced degree.



Coaching Services

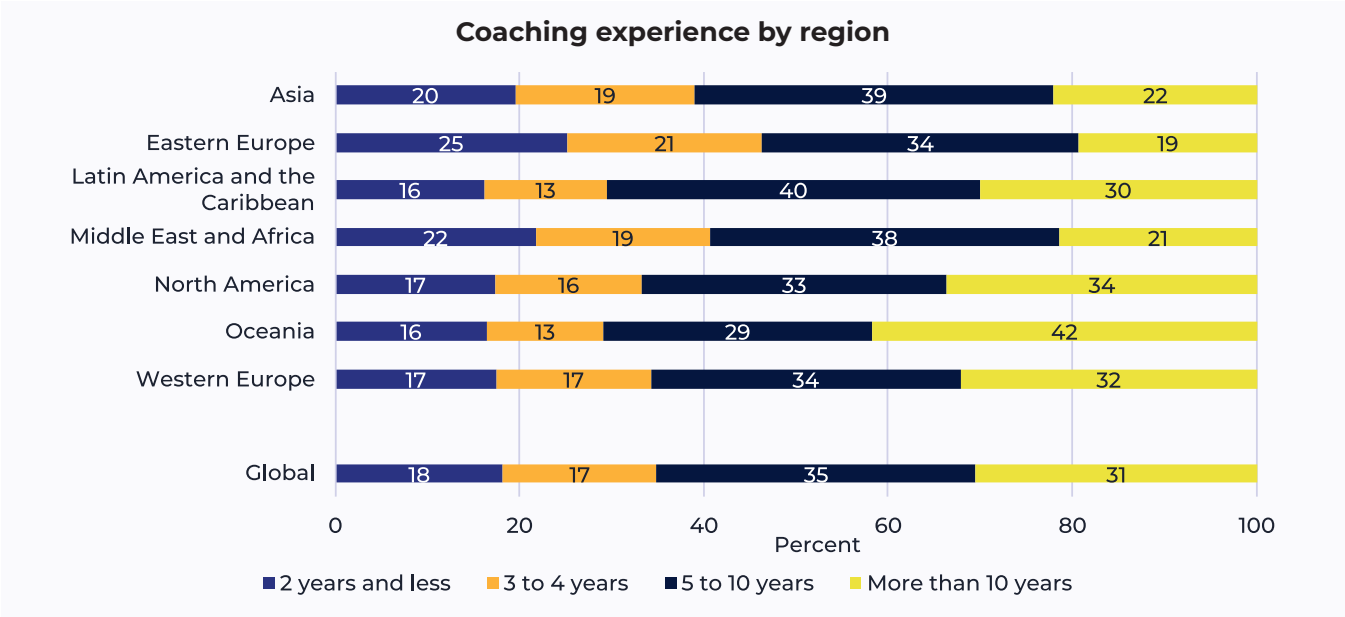
The following topics are discussed with reference to the services offered by coach practitioners:

- Coaching experience.
- Main area of coaching.
- Coaches serving both internal and external clients — percent of time spent as internal/external coach.
- Additional services offered by coach practitioners.

Coaching Experience

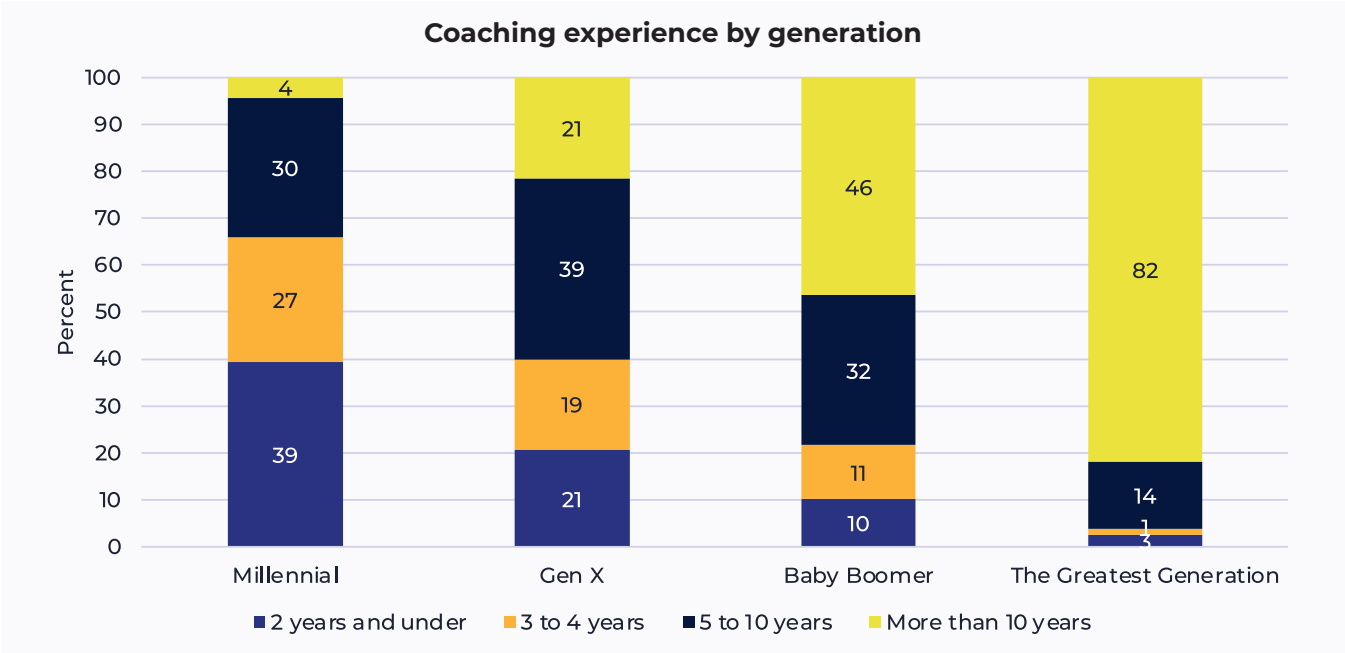
The proportion of coach practitioners with five or more years' experience is highest in the regions where coaching has been established for longer, with 71% in Oceania, 67% in North America, and 66% in Western Europe.

Except for Latin America and the Caribbean (71%), coaches with more than five years' experience are less prominent in the emerging countries where coaching has been growing most quickly. Coaches with more than five years' experience account for a slight majority in Eastern Europe (54%) and around six in 10 coaches in the Middle East and Africa (59%) and Asia (61%).



Coaching experience is positively linked to the age of the coach practitioner.

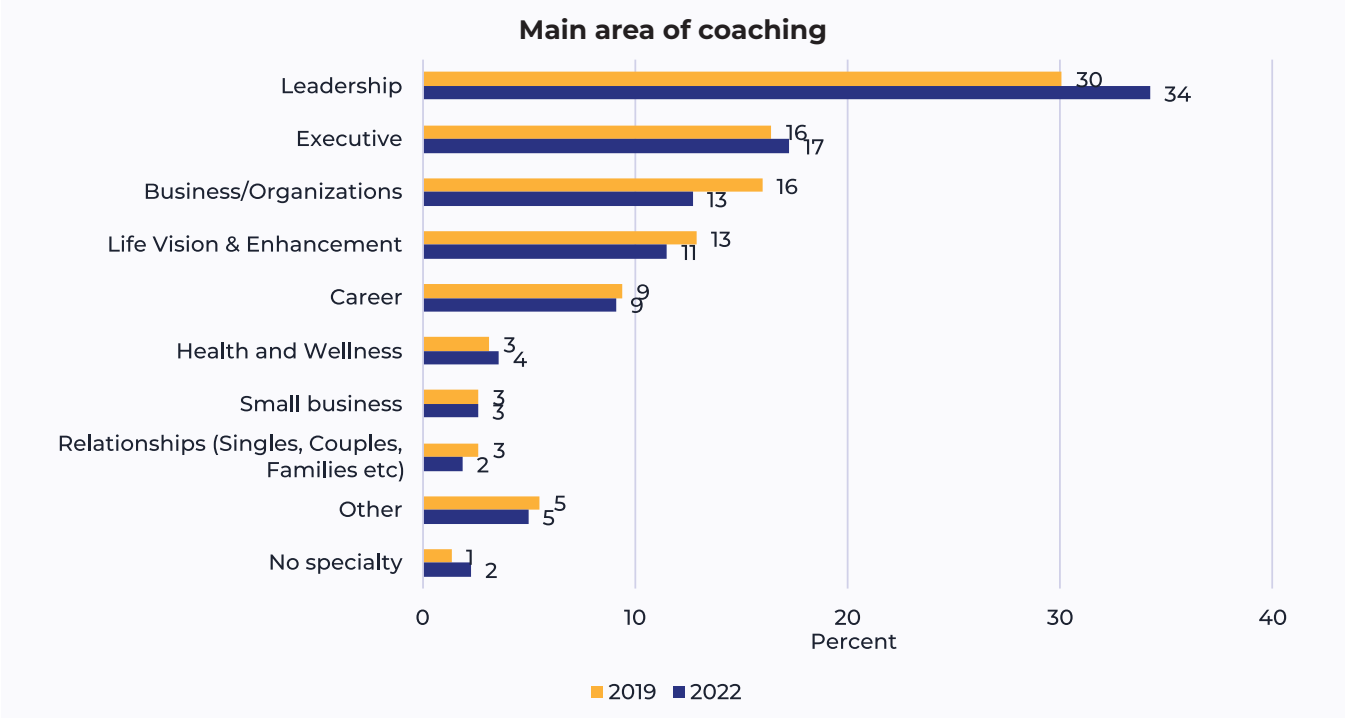
The percentage of coach practitioners with less than five years' experience is higher in the younger age groups. Almost two in three Millennials (66%) have less than five years' experience compared with 40% of Generation X coach practitioners and 22% of Baby Boomers.



Main Area of Coaching

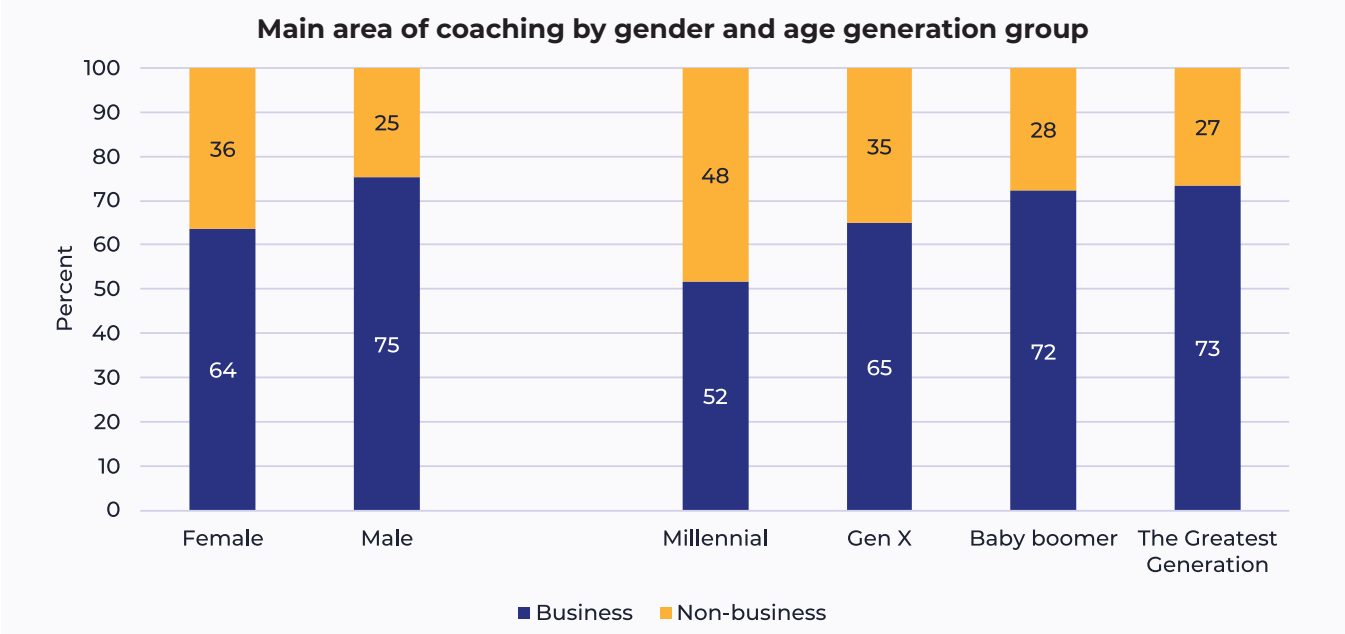
Leadership was the main area of coaching most frequently mentioned in the 2022 survey (34%), followed by executive coaching (17%) and business/organizations (13%). Along with small business (3%), those four areas of coaching are referred to collectively as **business coaching** throughout this report.

The proportion identifying business coaching as their main specialty has been steadily rising, up from 62% in 2015 to 65% in 2019 and 67% in 2022. The increase between 2019 and 2022 was driven by the rise in the proportion of coaches citing leadership coaching as their main specialty, up from 30% to 34%.

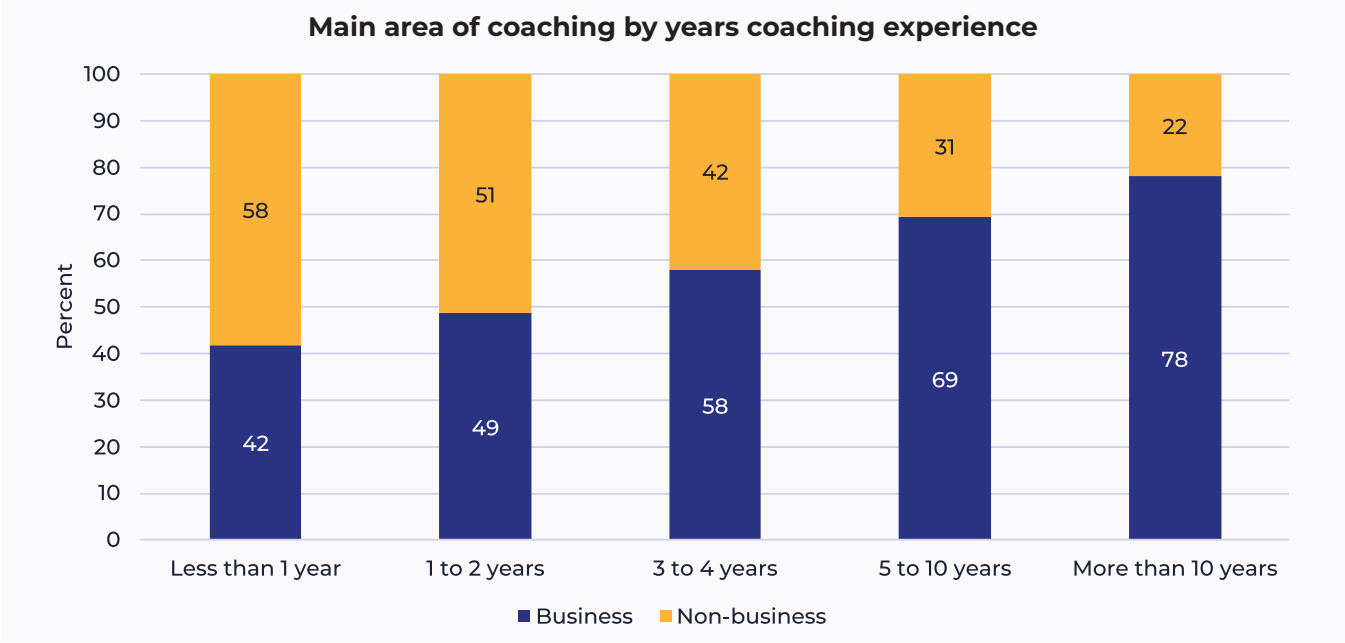


The prevalence of business coaching varies with gender and years of experience.

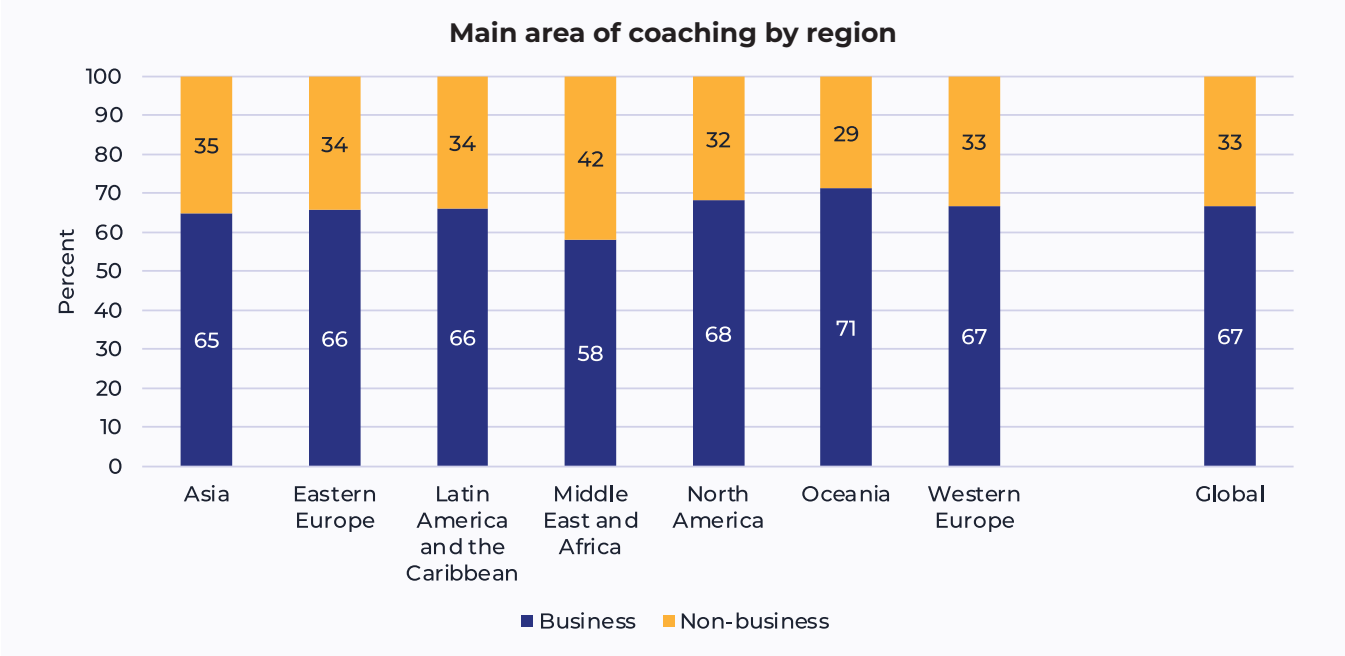
Male coach practitioners are more likely to have a business specialty (75% compared with 64% of female coach practitioners).



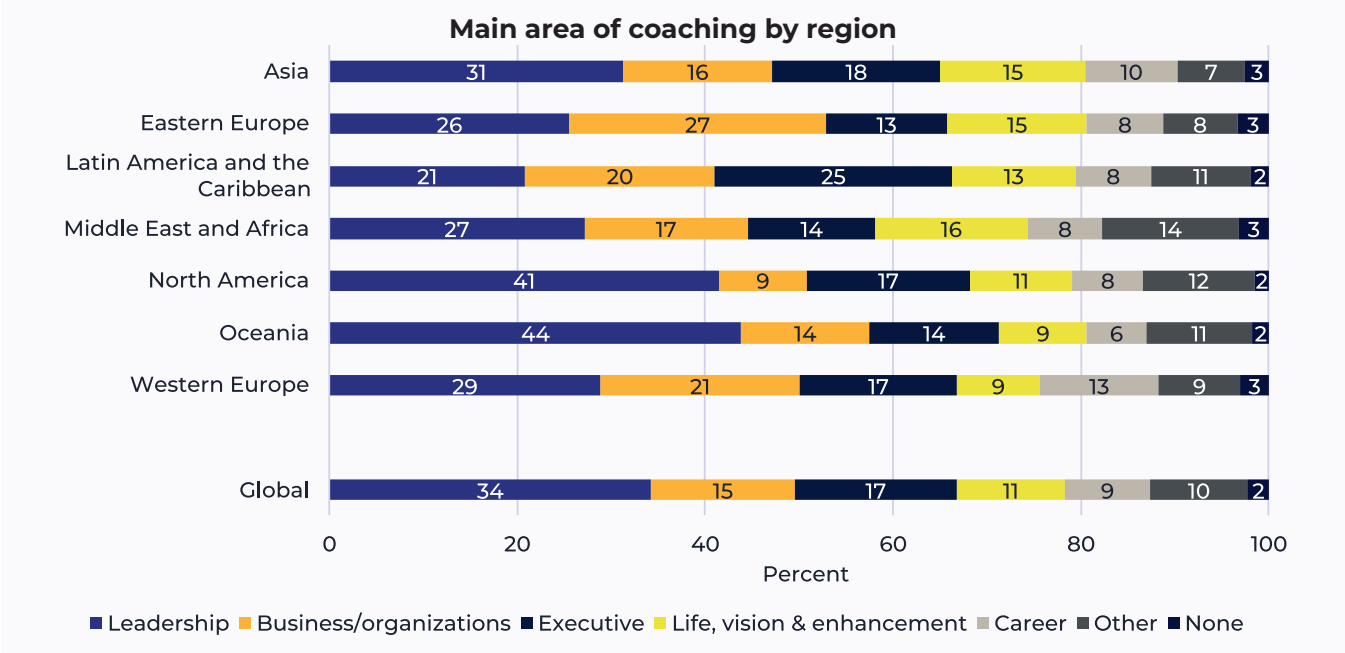
The more years of coaching experience, the higher the proportion of coach practitioners with business coaching as a main specialty, ranging from 42% of coach practitioners with less than one year of experience to 78% of those coaching for 10 or more years.



The proportion of coaches with a business specialty ranges from 58% in the Middle East and Africa to 71% in Oceania.



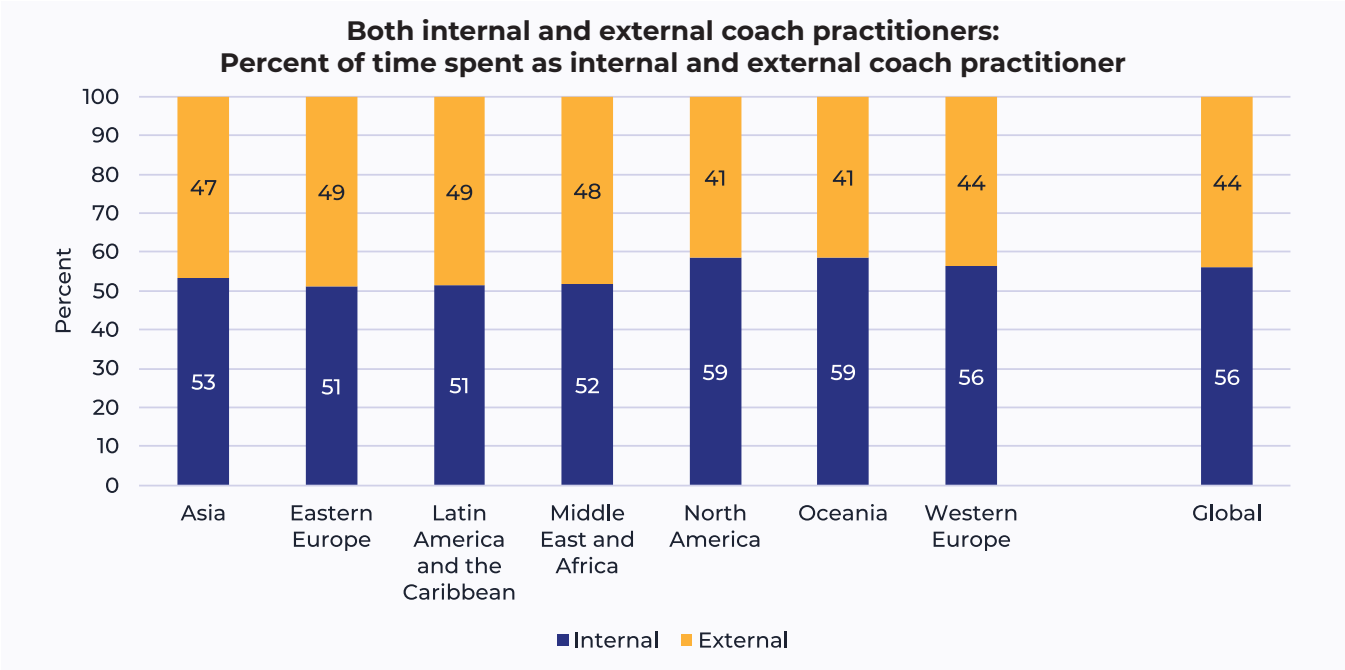
The mix of coaching specialties also varies by region. Leadership coaching is most prevalent in Oceania (44%) and North America (41%) and least prevalent in Latin America and the Caribbean (21%). Conversely, business/organization coaching was cited by 20% of coaches in Latin America and the Caribbean compared with 9% in North America and 14% in Oceania.



Percent of Time Spent as Internal/External Coach Practitioner

A little under one in five coach practitioners (16%) work as both an internal and external coach. On average, they devote a majority of their time to their internal coaching duties (56%).

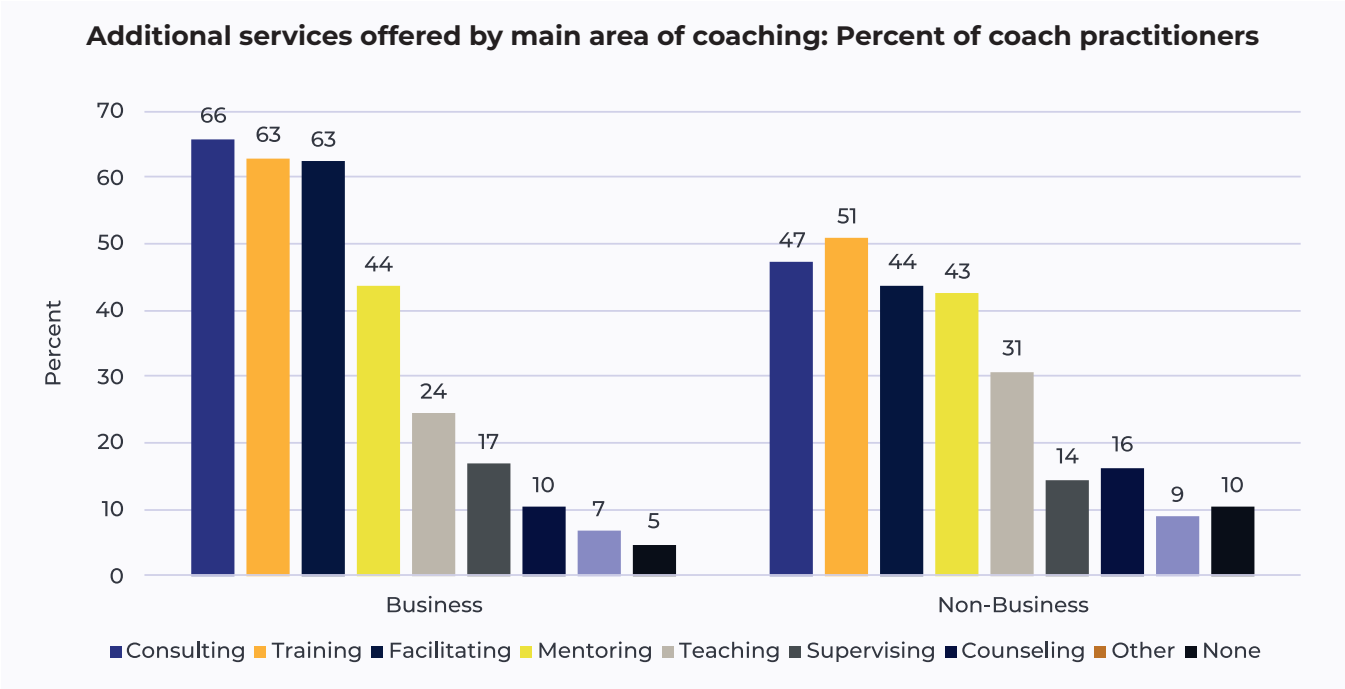
There are some regional variations in the allocation of time between internal and external coaching. Internal coaching accounts for a higher share of coaches' time in the more established regions of North America (59%), Oceania (59%), and Western Europe (56%).



Additional Services

Almost all coach practitioners (93%) offer services in addition to coaching. Most frequently, coaches also offer consulting (59%), training (58%), and/or facilitation services (55%). On average, coach practitioners offer almost three (2.8) services in addition to coaching. That is unchanged from 2015 and 2019.

Coach practitioners whose main area of coaching is business coaching typically provide a wider range of additional services compared to those with a non-business specialty. On average, coaches with a business coaching specialty offer 2.9 additional services compared with an average of 2.6 among coaches with a non-business specialty.



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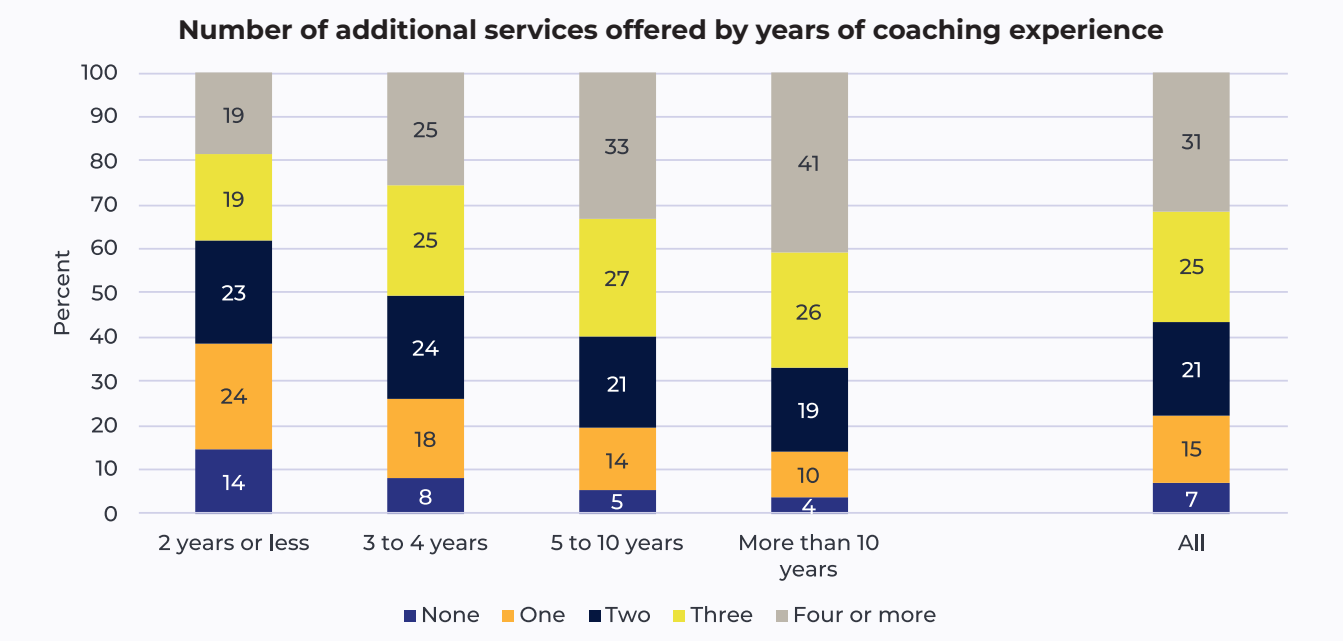
As their experience grows, coach practitioners accumulate a more diversified "portfolio" of additional services. On average, 67% of coach practitioners with 10 or more years of experience offer three or more additional services, compared with 38% of coaches with two years of experience or less.



The range and mix of additional services offered by coaches varies across the world regions. For example, consulting was most often cited as an additional service by coaches in North America (64%) and Latin America and the Caribbean (64%). By contrast, training received the most mentions in Western Europe (60%), Eastern Europe (67%), Middle East and Africa (64%), and Asia (63%).

The average number of additional services also varies by region, from 2.7 (North America and Western Europe) to 3.1 (Latin America and the Caribbean).

Additional services offered by region

	Asia	Eastern Europe	Latin America and the Caribbean	Middle East and Africa	North America	Oceania	Western Europe	Global
	%	%	%	%	%	%	%	%
Consulting	55	54	**64**	54	**64**	61	52	**59**
Training	63	**67**	53	64	55	58	60	**58**
Facilitating	53	43	56	52	58	6**6**	51	**55**
Mentoring	48	**57**	54	46	39	55	38	**43**
Teaching	23	25	**39**	23	30	20	20	**26**
Supervising	18	**19**	16	**19**	12	18	18	**16**
Counseling	14	15	**20**	19	8	9	18	**13**
Other	5	7	8	7	7	10	10	**7**
None	6	6	5	6	9	3	6	**7**
Average number of additional services	2.8	2.9	3.1	2.8	2.7	3.0	2.7	**2.8**

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The Client

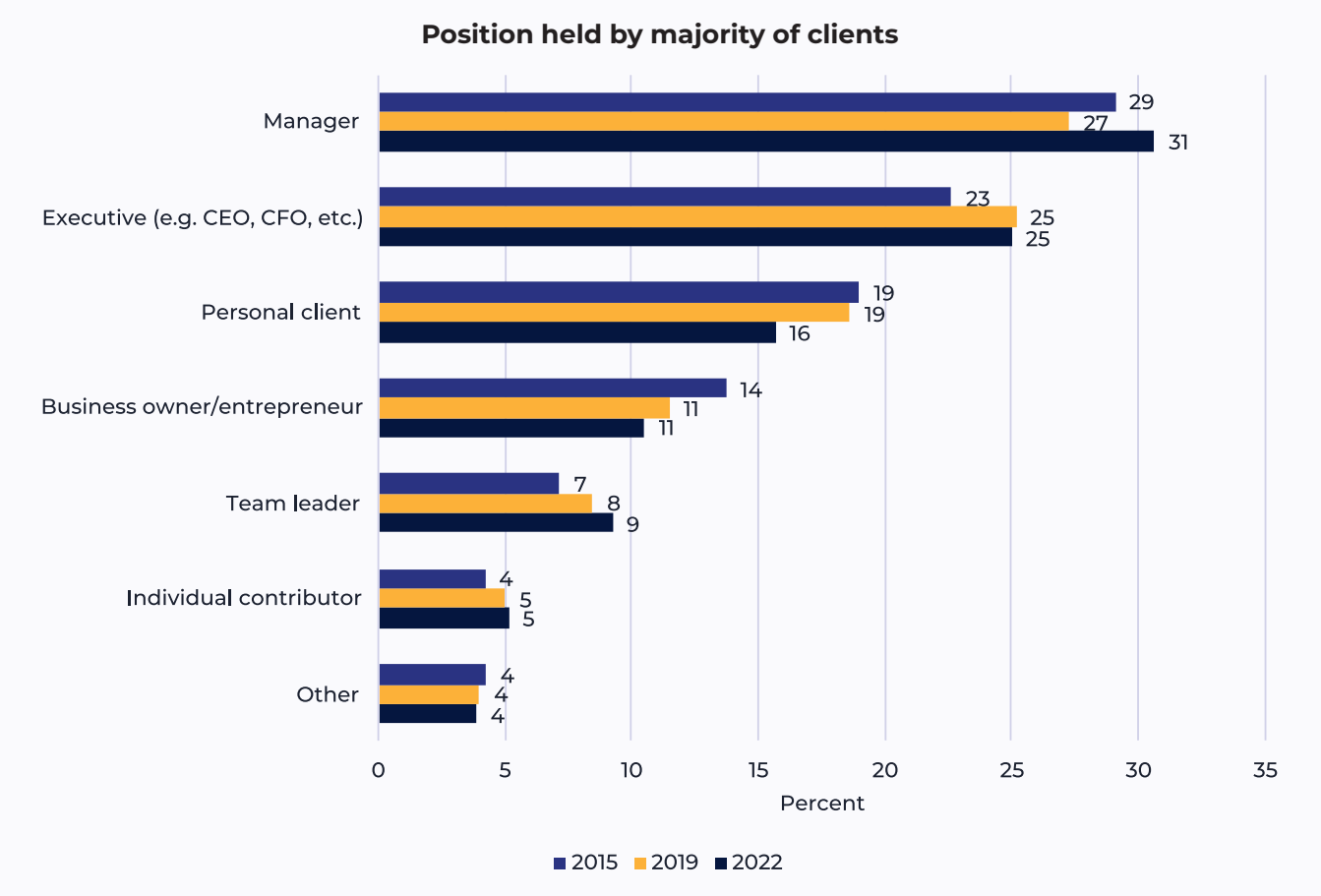
The characteristics of clients served by coach practitioners are discussed as follows:

- Position held by clients.
- Primary and sponsored clients.
- Clients' gender.
- Client age composition.

Position Held by Clients

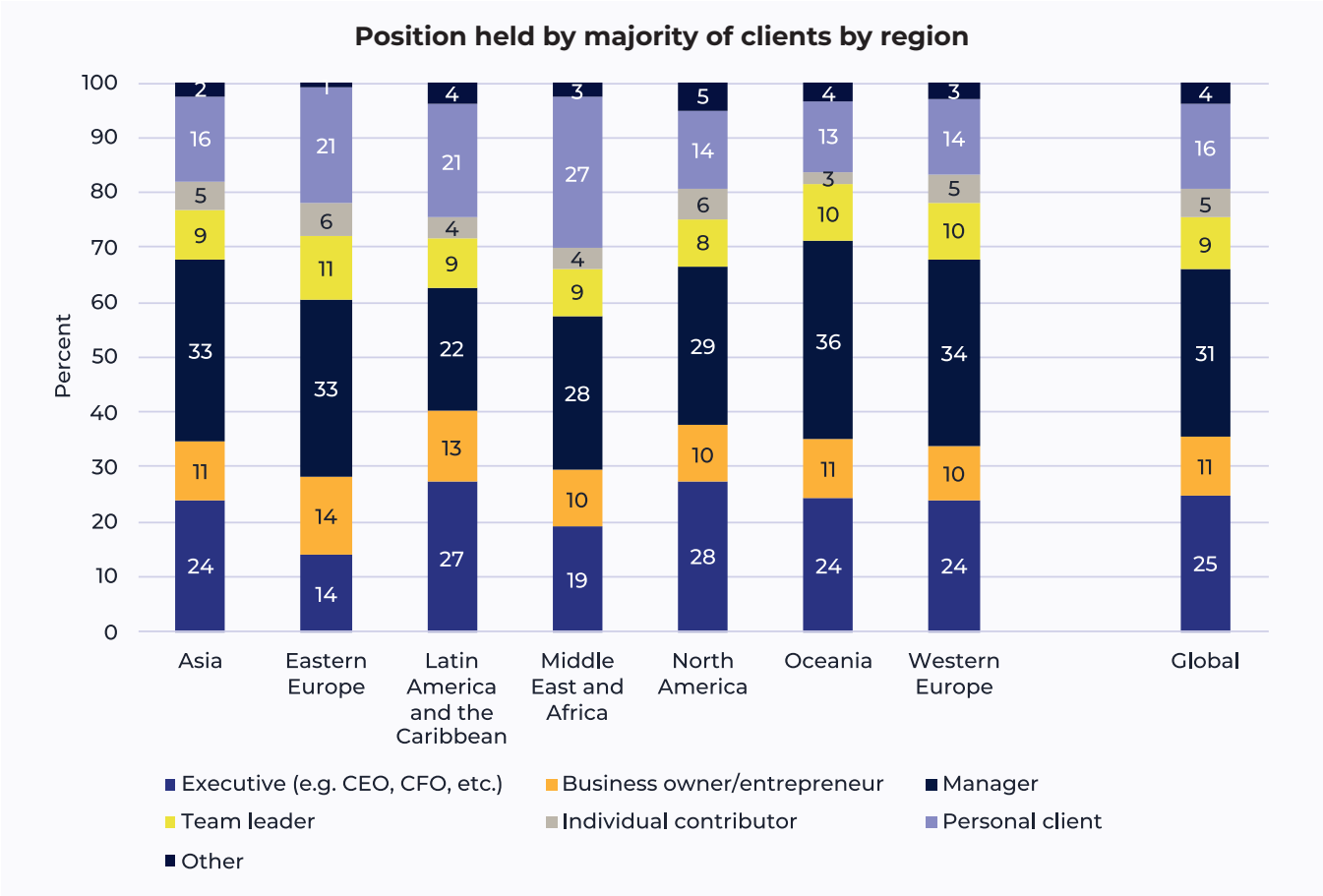
The overall mix of clients served by coach practitioners has remained broadly unchanged since 2015.

In 2022, a little over one in two coach practitioners said their clients are mostly managers (31%) or executives (25%), albeit the combined total of 56% represents an increase compared with 2019 (52%). The proportion saying they mostly coach personal clients fell from 19% in 2019 to 16% in 2022.

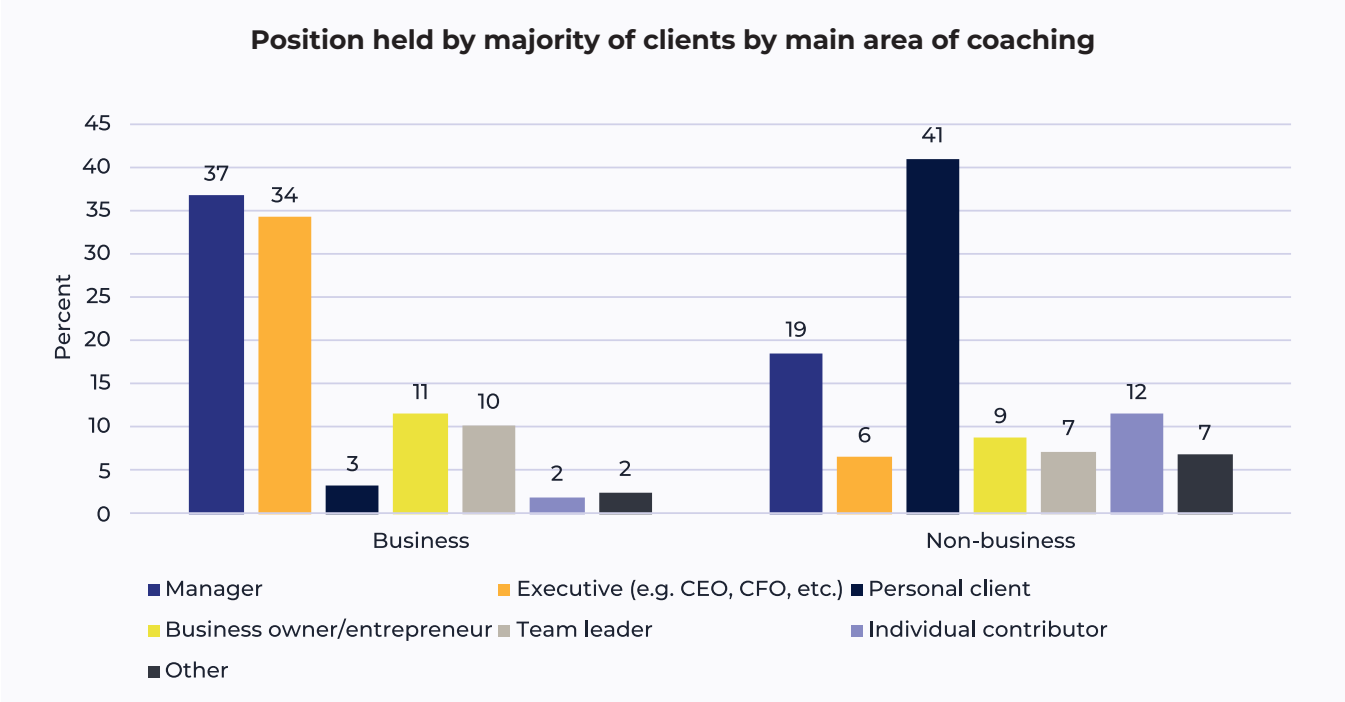


The mix of clients varies with the attributes of coaches, including the region in which they live, their main area of coaching, years of experience, age, gender, and whether they work as an external or internal coach practitioner.

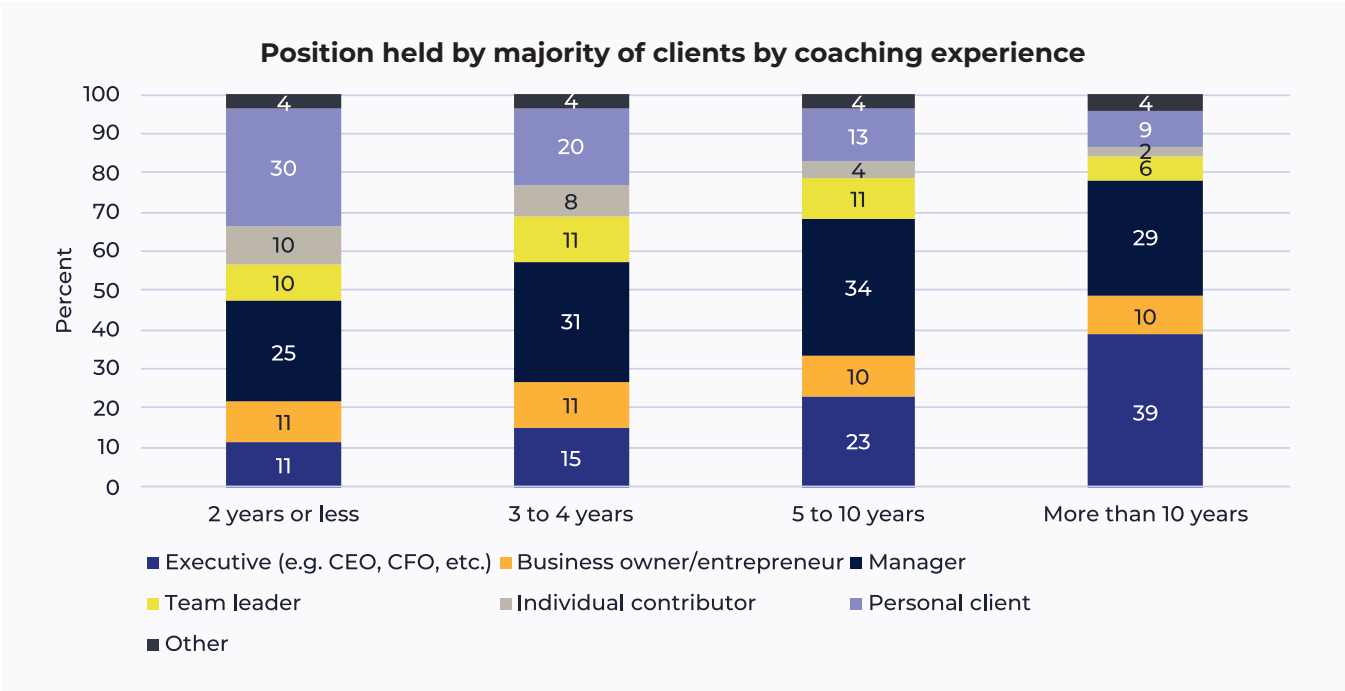
Similar to previous surveys, coach practitioners in emerging regions have a higher share of personal clients (27% in the Middle East and Africa and 21% in both Latin America and the Caribbean and Eastern Europe). Personal clients account for a smaller share of the client mix in North America (14%), Oceania (13%), and Western Europe (14%).



The client profile is strongly linked to the coach practitioner's main specialty. Coach practitioners with a business specialty mostly serve managers (37%) or executives (34%). By contrast, over four in 10 coach practitioners with a non-business specialty rely mainly on personal clients (41%).



The mix of clients coached also varies with the coach practitioner's years of experience. The greater the number of years coaching, the more likely the coach is to have a majority of clients in executive or manager positions. The fewer the number of years coaching, the more likely the coach is to mainly coach personal clients.



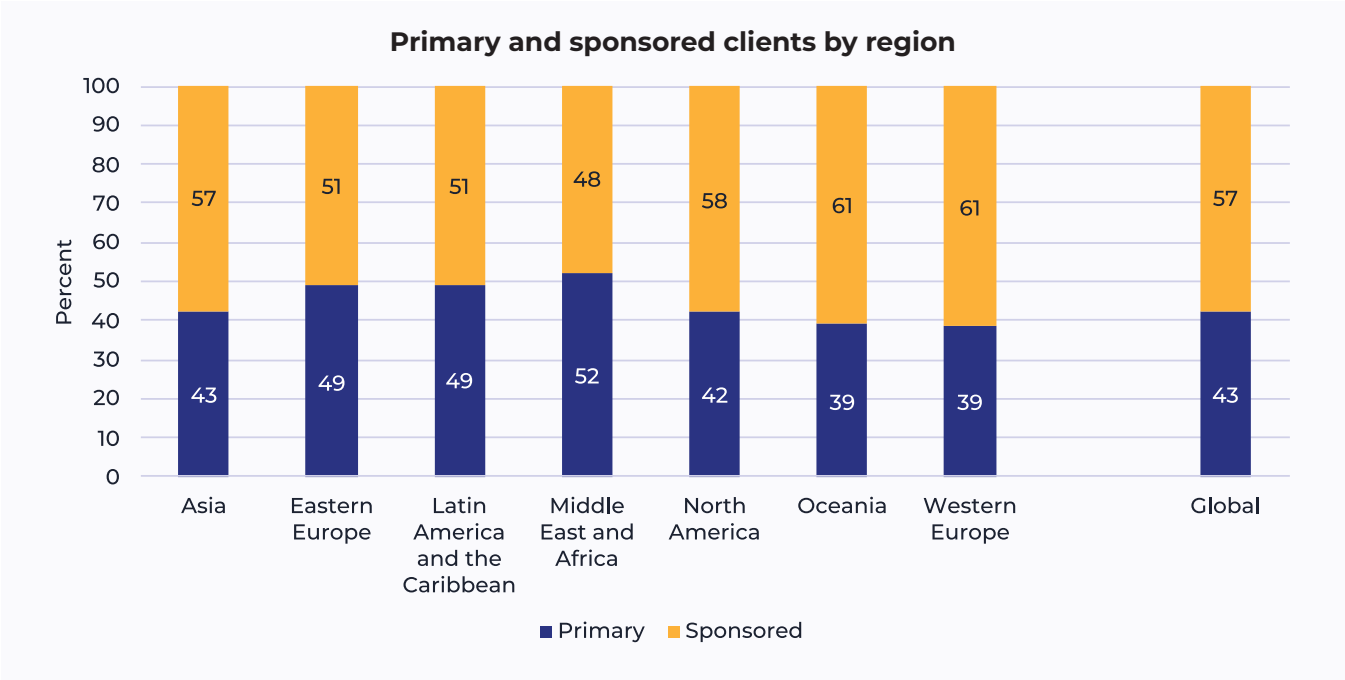
Other factors influencing the mix of client positions include:

- Gender – Male coach practitioners are more likely to have executives as their majority client type (31% compared to 23% of females). Female coach practitioners are more reliant on personal clients (17% compared to 11% of males).
- Generation – The proportion of clients in executive positions ranges from 10% among Millennials to 21% for Generation X and rising to 32% among Baby Boomers.

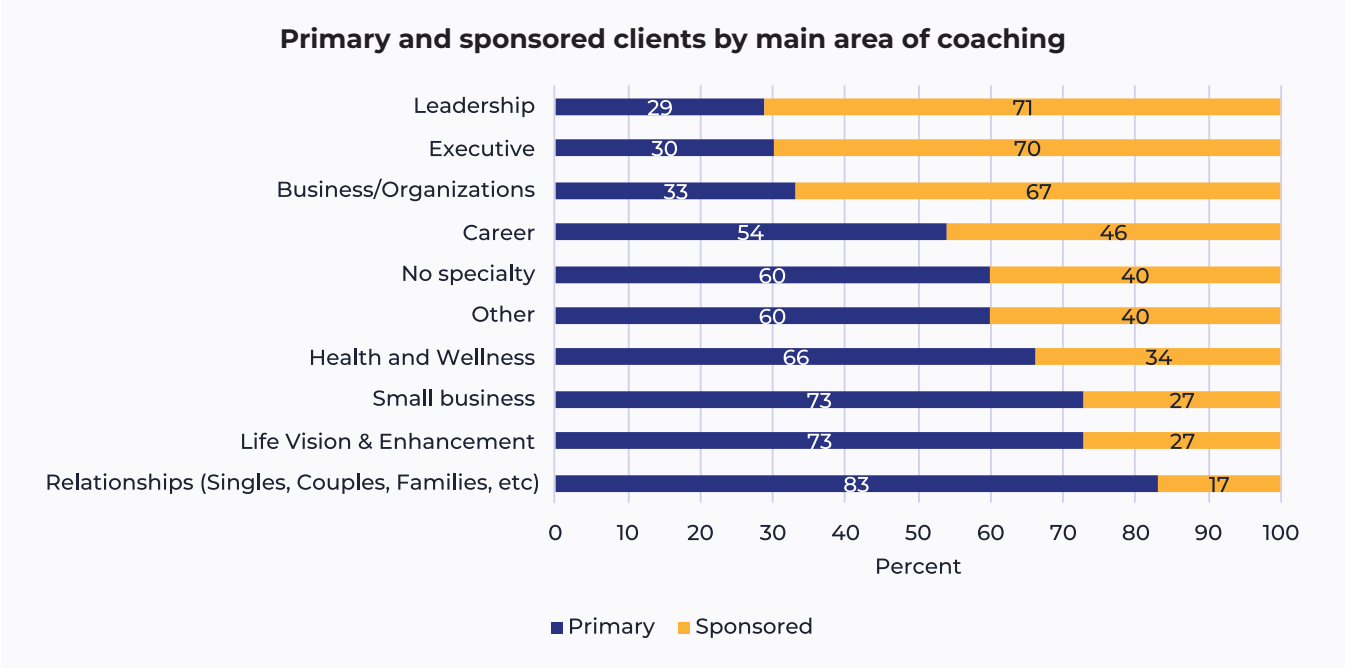
Primary and Sponsored Clients

Coach practitioners were asked to indicate what proportion of their clients pay for their own coaching (primary clients) and what proportion have their coaching paid for by a third party (sponsored clients).

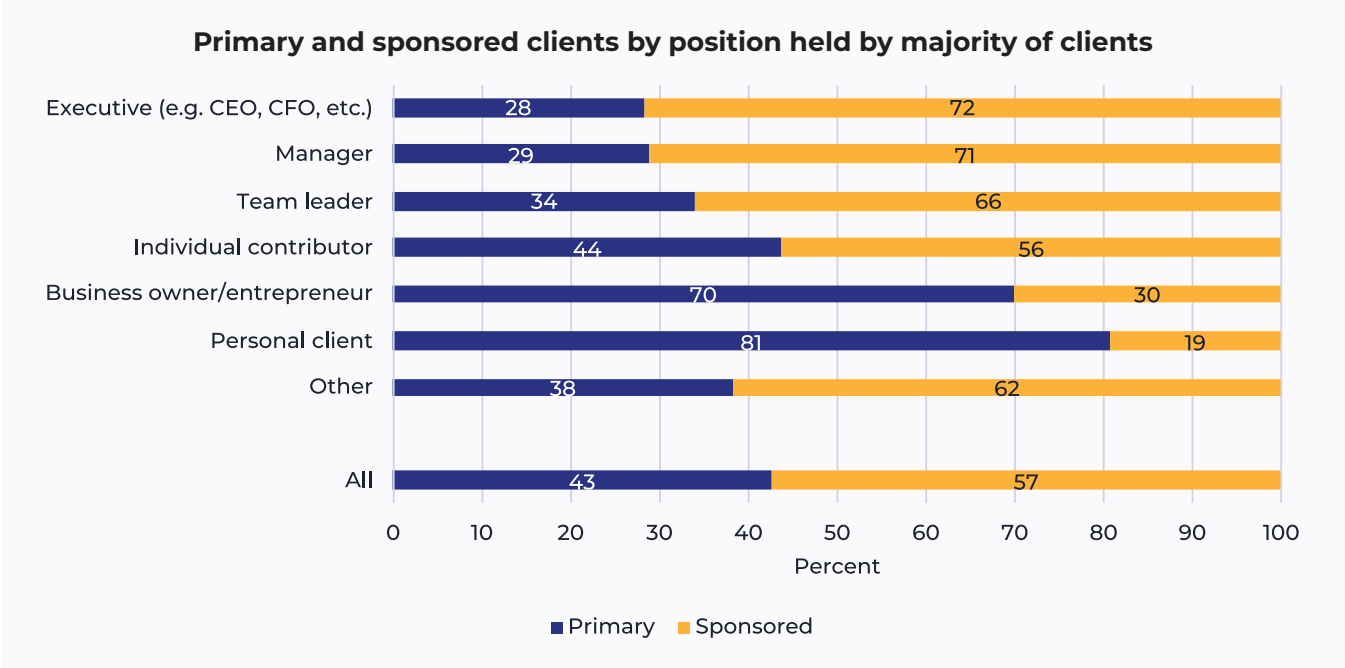
On average, coach practitioners said that 57% of their clients are sponsored and 43% are primary clients. Compared to 2019, the sponsored share has increased (up from 52%) while the primary share has fallen (from 48%).



The split between primary and sponsored clients is also strongly linked to their main area of coaching. Coach practitioners with a business specialty are more likely to have sponsored clients than those with a non-business specialty. Overall, coaches with one of the four business specialties have 68% sponsored clients versus 35% sponsored for coaches with the non-business specialties.

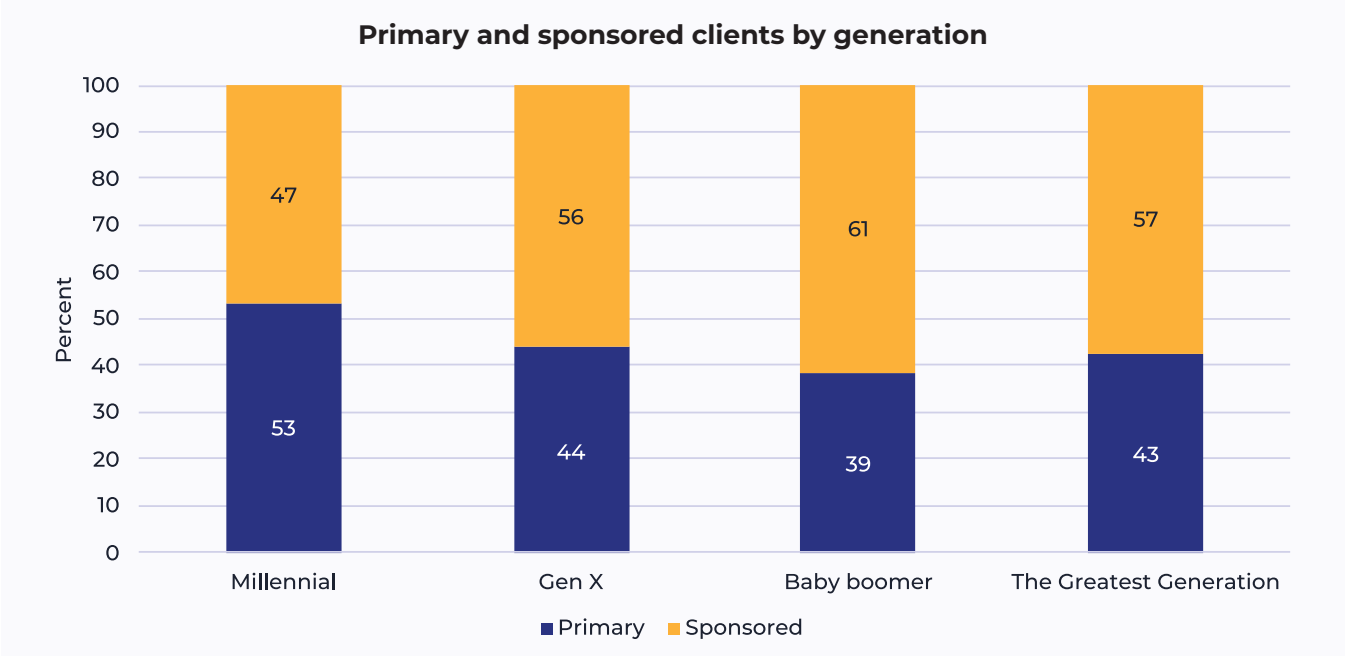


The position held by the majority of the coach's clients also influences the split between primary and sponsored clients. Among those who mainly coach executives, the average sponsored share is 72%, falling to 19% among those who mainly coach personal clients.



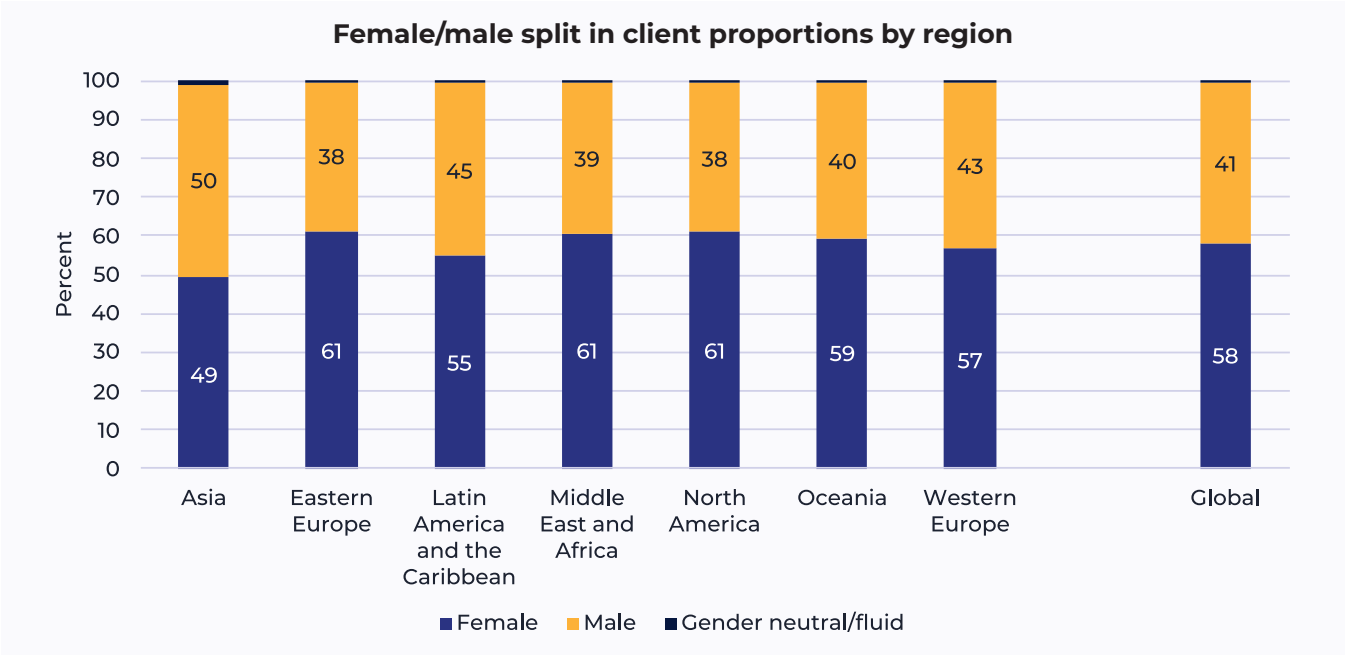
The split between primary and sponsored clients is strongly related to the number of years coaching. The sponsored share ranges from 28% among coaches with less than one year of experience to 66% for coach practitioners with 10 plus years of experience.

Reflecting the linkage with years of experience, the primary/sponsored split also varies with the age of the coach practitioner. In particular, when compared with the other age generation groups, Millennials have an above-average share of primary clients (53%) and a below-average share of sponsored clients (47%).



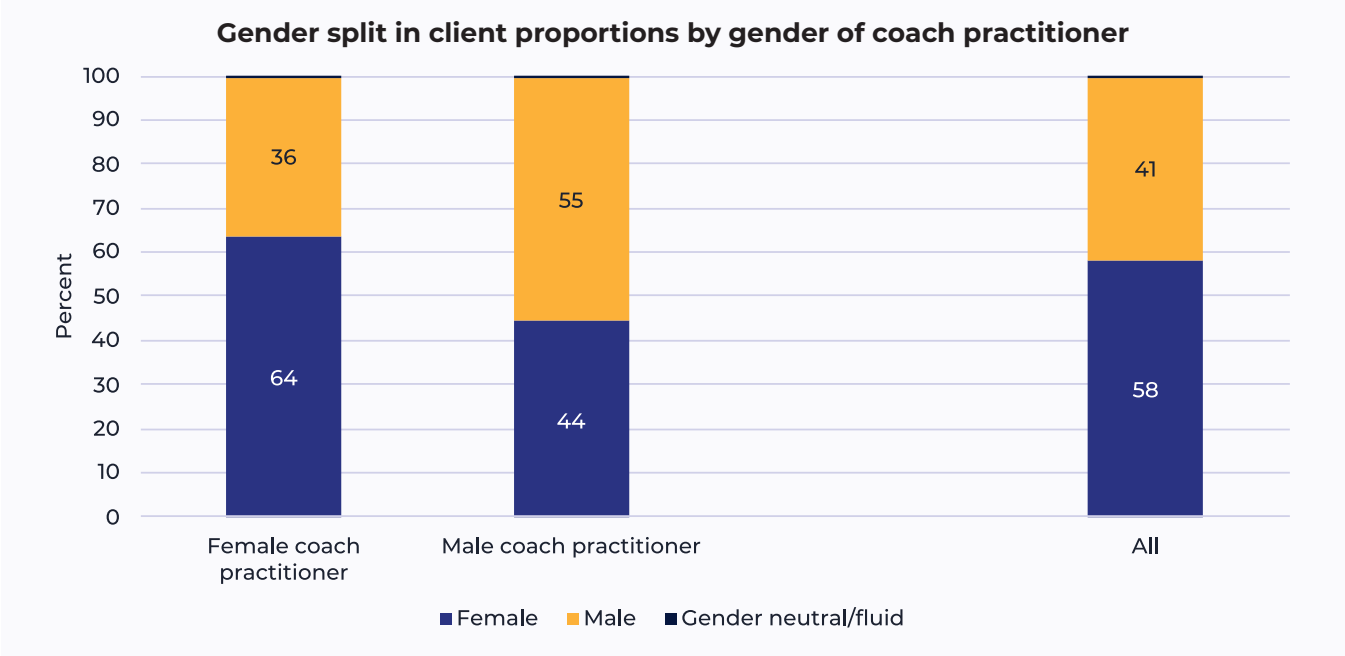
Clients' Gender

The majority of coaching clients (58%) are female, ranging from 49% in Asia to 61% in North America, Eastern Europe, and the Middle East and Africa.



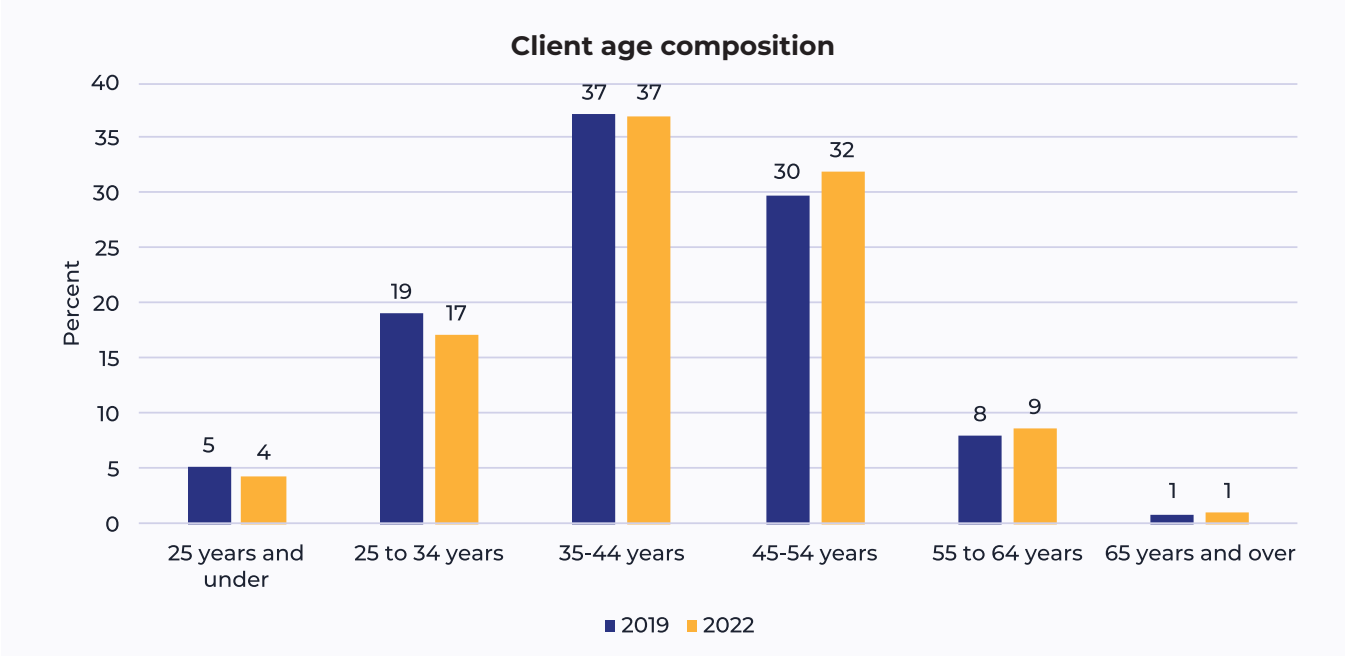
The female share of clients varies as follows:

- Among female coach practitioners, 64% of clients are also female, compared with 44% of clients where the coach practitioner is male.
- Considering the client's position, the female share ranges from 72% among those who mainly coach personal clients to 50% among those mainly coaching executives.
- Females comprise 65% of clients coached by Millennials compared with 59% for Generation X coaches and 56% among Baby Boomers.

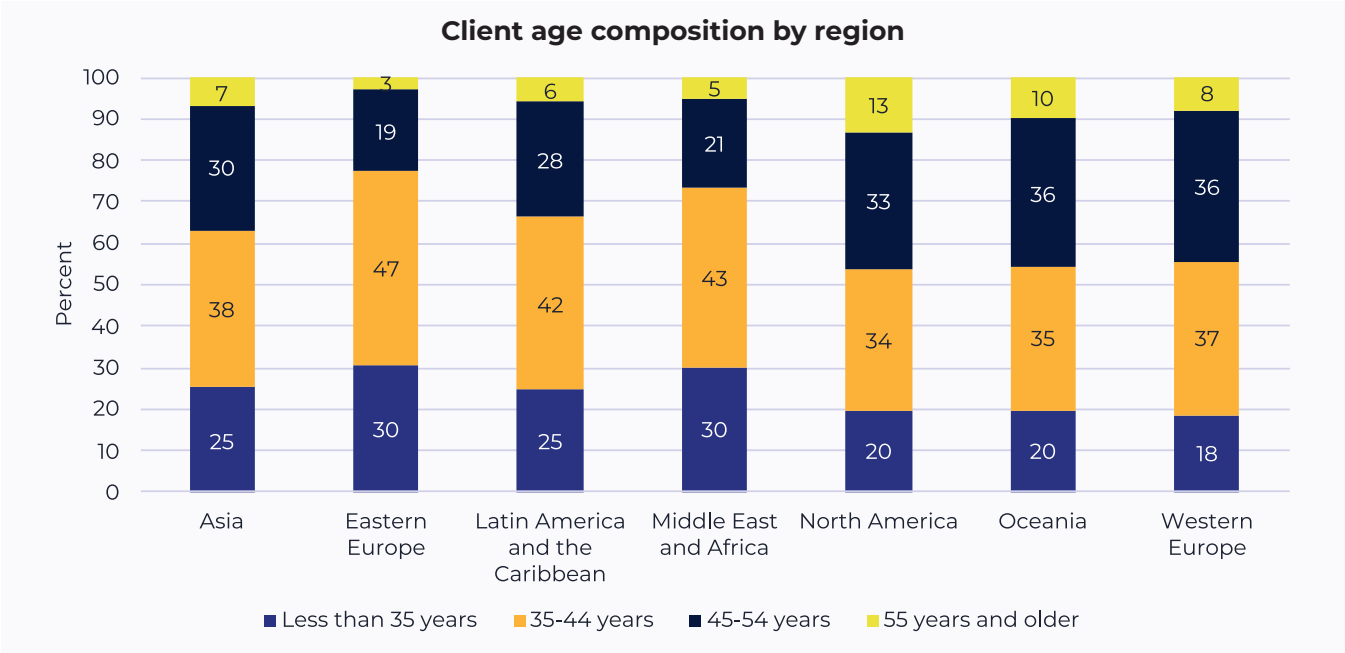


Client Age Composition

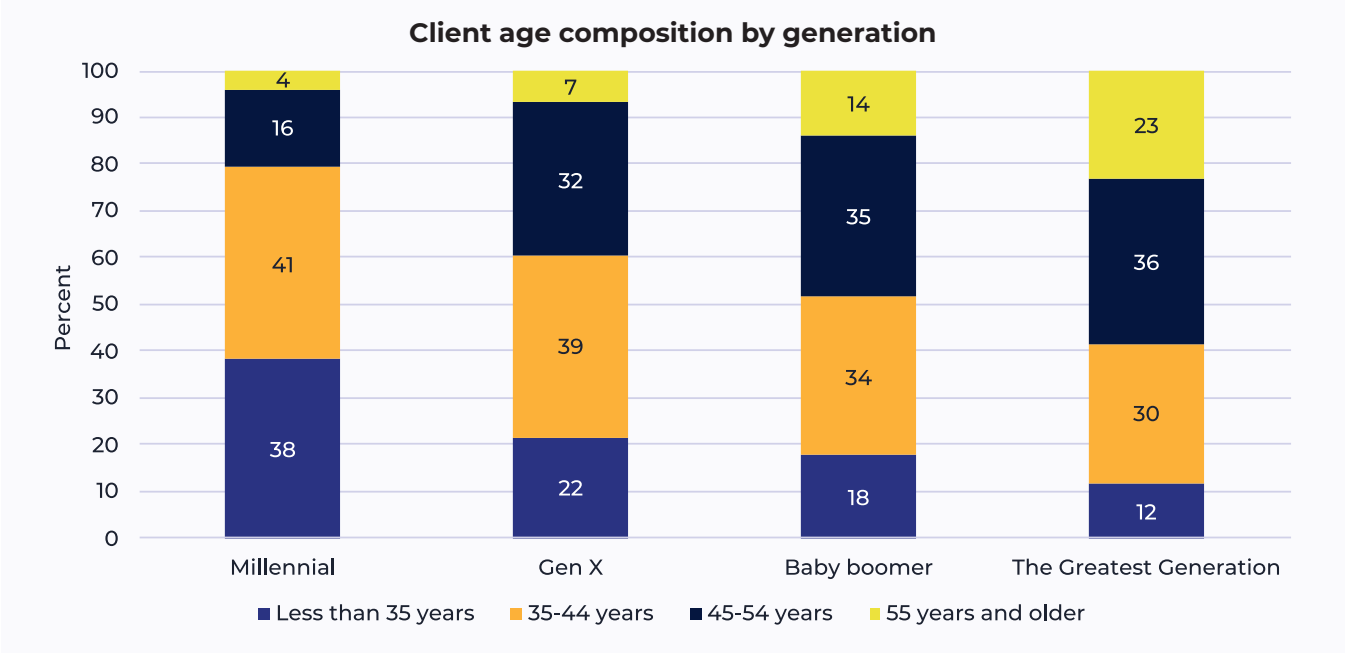
Clients aged between 35 and 44 years are most frequently in receipt of coaching services (37%), followed by clients in the 45–54 age range (32%). Around one in five (21%) are aged under 35 years. The age composition of coaching clients in 2022.



The profile of clients tends to be younger in the emerging regions, with higher proportions aged under 35, including 30% in Eastern Europe and the Middle East and Africa compared with around one-fifth in North America (20%), Oceania (20%), and Western Europe (18%).



The age profile of the client also varies with the age generation group of the coach. For example, 38% of those coached by Millennials are less than 35 compared with 18% of those coached by Baby Boomers.



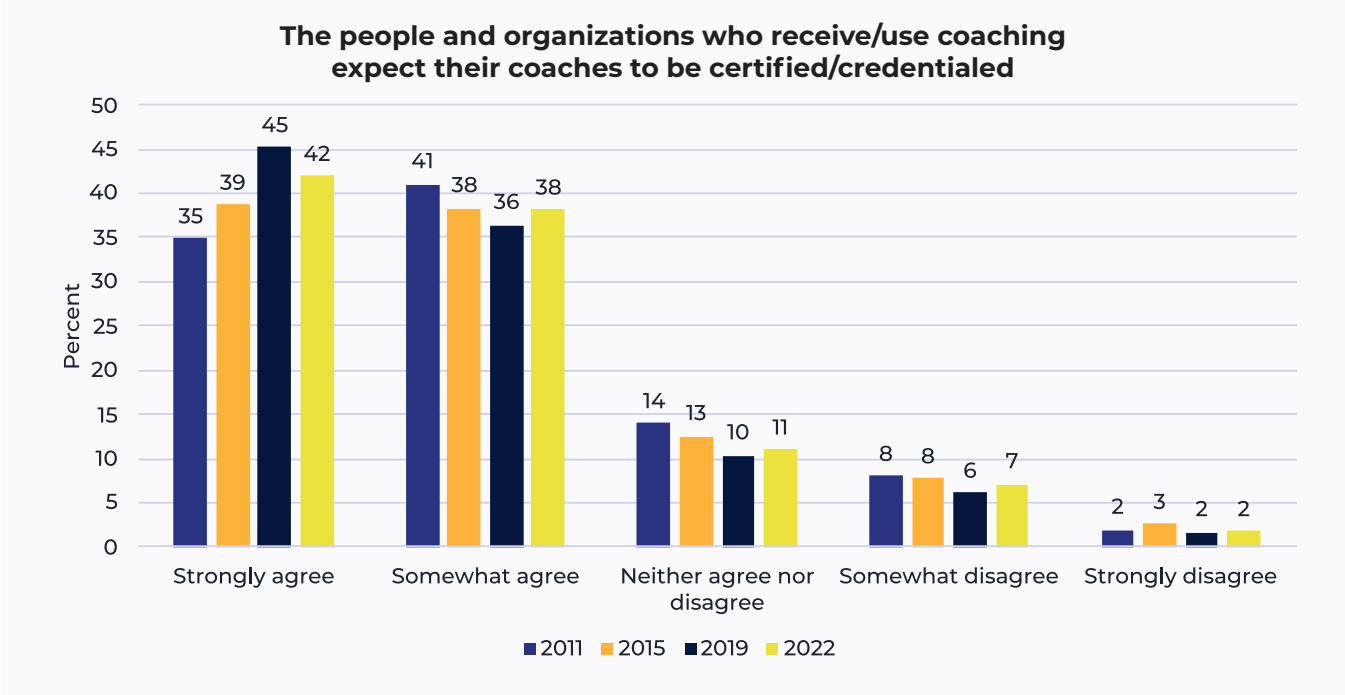
Memberships and Credentials

The topics discussed in relation to training and credentialing are as follows:

- Client expectations.
- Membership in coaching organizations.
- Certifications/credentials from coaching organizations.

Client Expectations

The overwhelming majority of coaches (80%) agree that their clients expect coaches to be certified/credentialed, including 42% strongly agreeing and 38% somewhat agreeing.



Coach practitioners in emerging regions were more likely to strongly agree that clients expect coaches to be certified/credentialed, led by the Middle East and Africa (58%), Asia (55%), and Latin America and the Caribbean (55%).

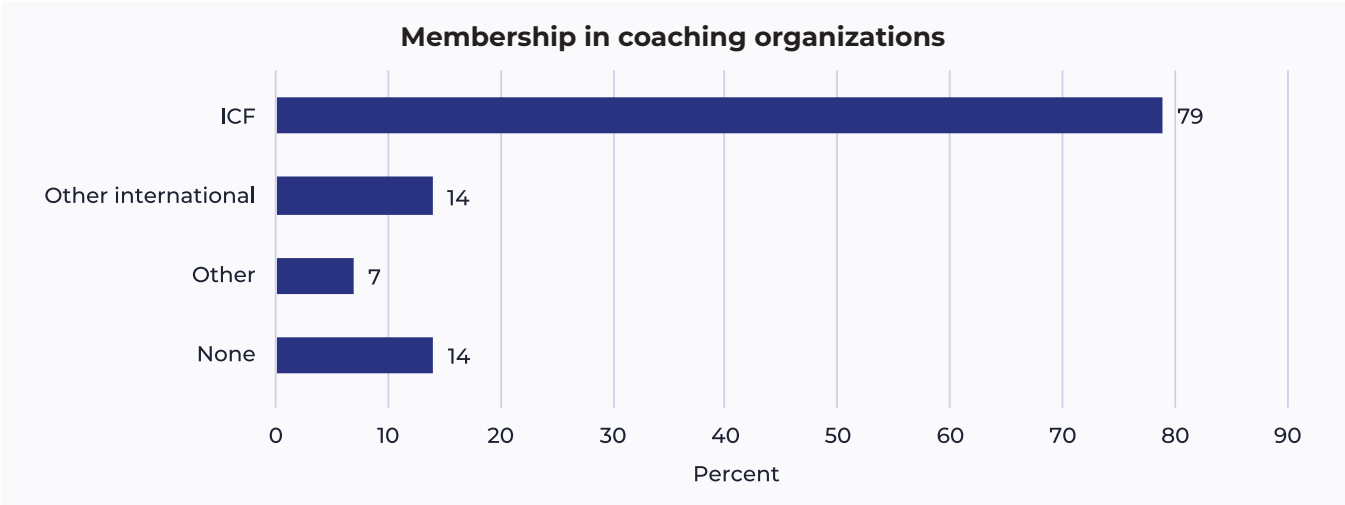
The proportion strongly agreeing that people and organizations who receive/use coaching expect their coaches to be certified/credentialed was above average among coaches:

- Working as internal coaches (47%) followed closely by those working both as internal and external coaches (46%), compared with 41% of those working solely as external coaches.
- With less than one year of experience (50%).
- Holding a coaching certification/credential (44% versus 29% of those without a certification/credential).

Membership in Coaching Organizations

More than eight in 10 coach practitioners (86%) said they are a member of one or more coaching organizations, up from 79% in 2015 and 82% in 2019.

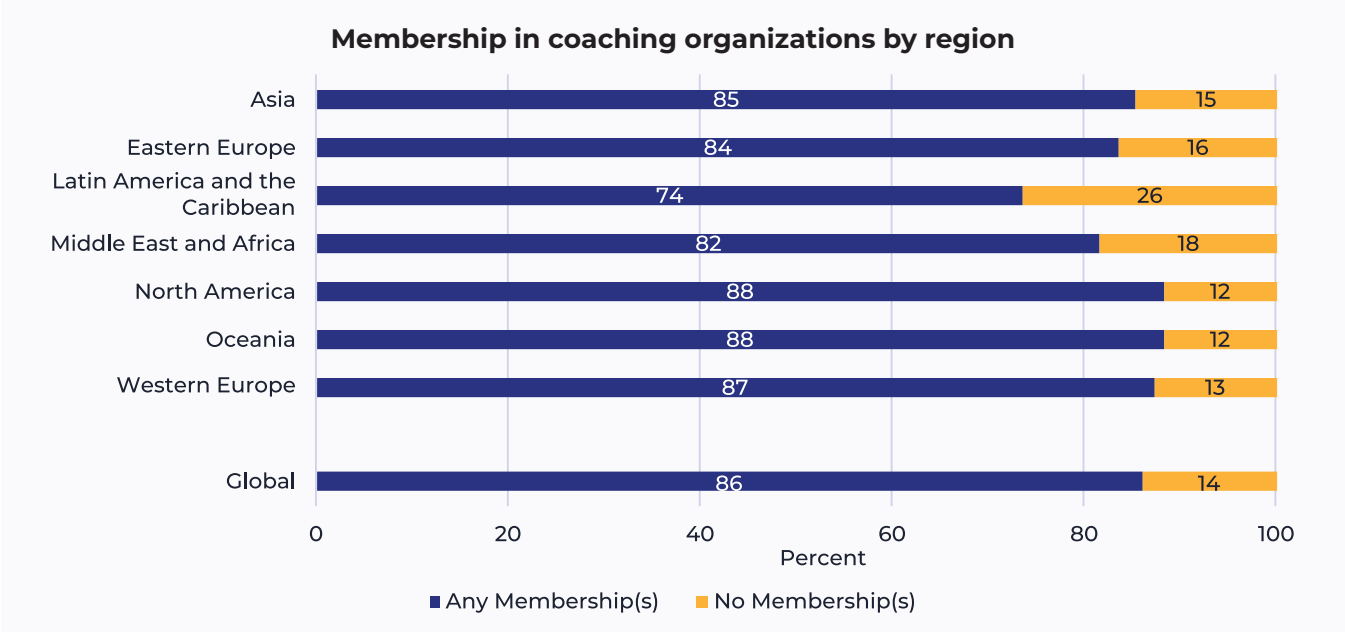
Almost four in five coach practitioner respondents (79%) said they are an ICF member. As outlined in the Technical Appendix, the ICF member database was the primary means of contacting potential survey respondents. The ICF share of survey respondents reflects that element of the survey methodology.



NOTE: *The figures shown in the chart add up to more than 100% because some respondents may be members of more than one of the organization types listed.*

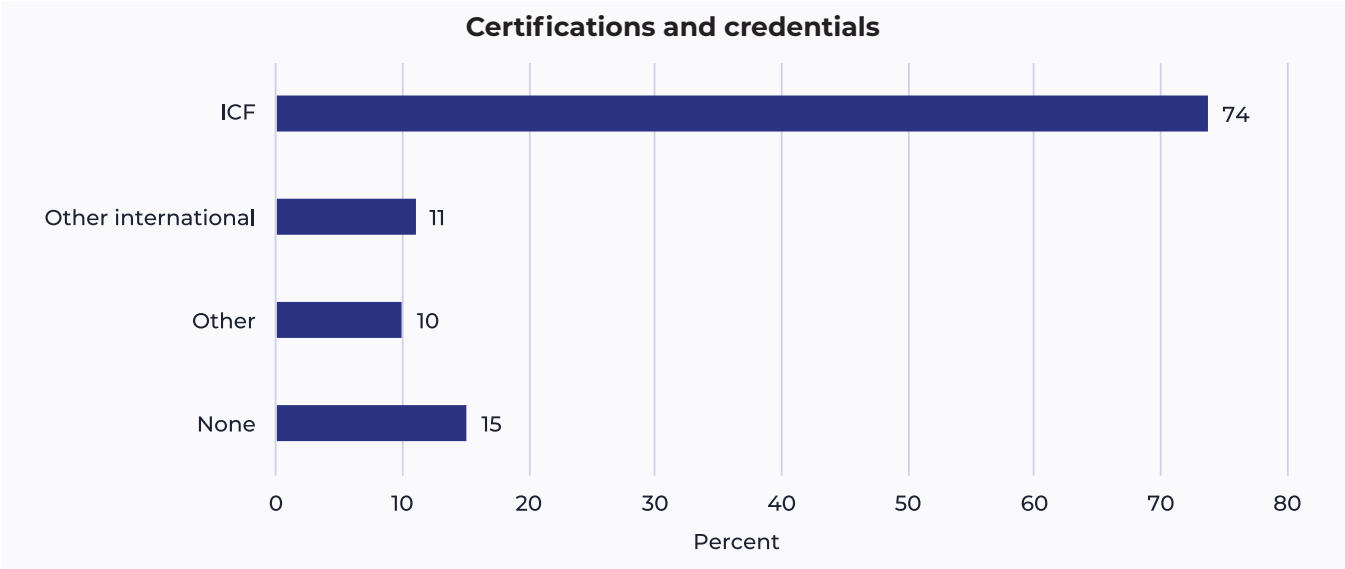
Membership in any coaching organization varies along a number of dimensions:

- Region – from 88% in both North America and Oceania to 74% in Latin America and the Caribbean.
- Age – 80% of Millennials, 86% of Generation X, and 88% of Baby Boomers.
- Years of coaching experience – from 73% among those with less than one years' coaching experience to 88% of those coaching 3 to 4 years.
- Currently with active clients – 87%, versus 74% among those who do not currently have active clients.



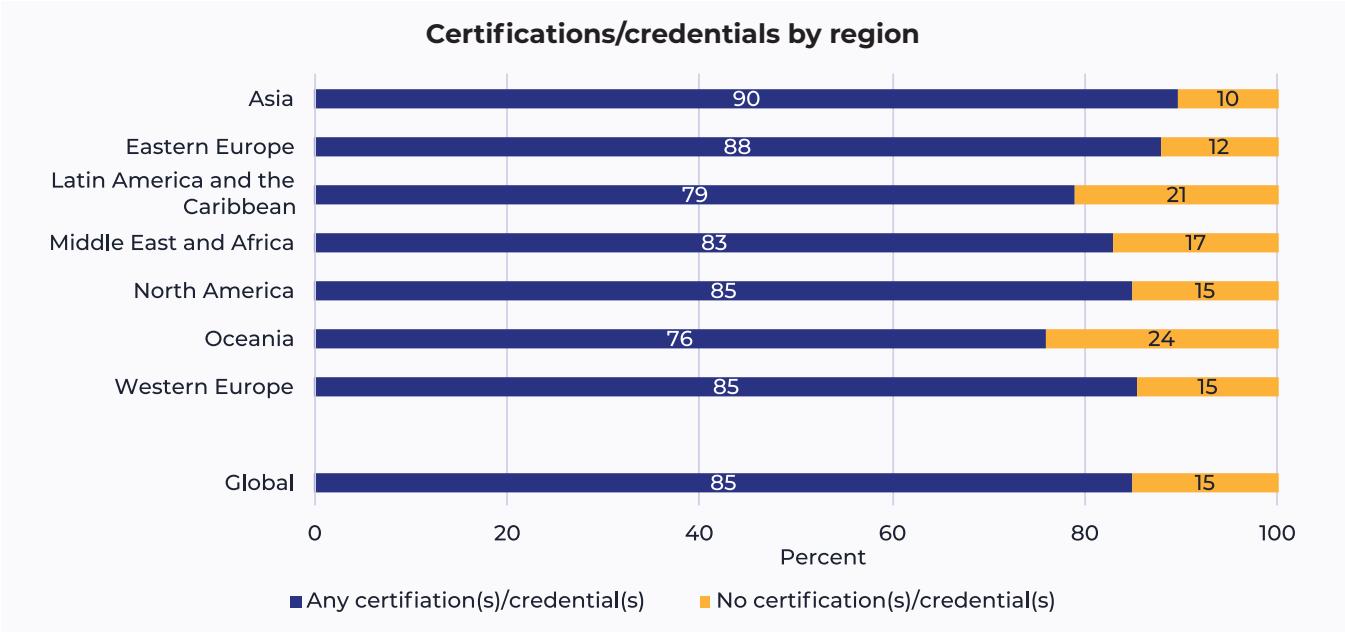
Certifications/Credentials from Coaching Organizations

An increasing proportion of coach practitioners hold a certification/credential from a coaching organization. In the 2022 survey, 85% said they currently hold a certification/credential from a coaching organization, up from 69% in 2015 and 74% in 2019.



NOTE: *The figures shown in the chart add up to more than 100% because some respondents may hold certifications or credentials from more than one of the organization types listed.*

The proportion of coach practitioners with one or more certifications/credentials varies by region, from 90% in Asia to 76% in Oceania.



Other factors linked to holding certifications/credentials include:

- Active coach practitioners – 86% of those currently with active clients versus 74% of those with no currently active clients.
- Generation – Millennials are slightly less likely to hold a certification/credential (82%) compared to Generation X (85%) and Baby Boomer coaches (86%).
- Coaching experience – 57% of coaches with less than one years' experience and 79% of coaches with 1 to 2 years' experience compared with 87% of coaches with more than 2 years' experience.
- Coach practitioners with a business specialty (88%) are slightly more likely to hold a certification/credential than those with a non-business specialty (83%).

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Key Points Summary

The following are the key findings from the profile of coach practitioners.

Demographics

- Almost one in two coach practitioners (48%) are in the Generation X age cohort, ranging from 40% in North America to 62% in Eastern Europe.
- The proportion of coach practitioners who are Baby Boomers ranges from 16% in Eastern Europe to 49% in North America. North America and Oceania are the only regions where Baby Boomers outnumber Generation X coaches.
- Globally, Millennials account for one in 10 coach practitioners, ranging from 21% in Eastern Europe to 8% in North America and 7% in Oceania.
- The female share of coach practitioners has been edging steadily upward, reaching 72% in 2022, up from 70% in 2019 and 67% in 2015.
- Compared with the position in 2019, the largest increase in the female share was in the Middle East and Africa, up from 66% to 72% in 2022.
- The female share of coach practitioners ranges from 59% in Asia to 78% in Eastern Europe.
- The vast majority of coaches hold a degree-level qualification or higher, including 30% with a bachelor's degree and 65% with a more advanced degree.

Coaching Services

- Coaching experience is positively linked to the age of the coach practitioner.
- The percentage of coach practitioners with less than five years' experience is higher in the younger age groups. Almost two in three Millennials (66%) have less than five years' experience compared with 40% of Generation X coaches and 22% of Baby Boomers.
- Leadership was the main area of coaching most frequently mentioned in the 2022 survey (34%), followed by executive coaching (17%) and business/organizations (13%). The proportion identifying business coaching as their main specialty has been steadily rising, up from 62% in 2015 to 65% in 2019 and 67% in 2022.
- A little under one in five coach practitioners (16%) work as both an internal and external coach. On average, they devote most of their time to their internal coaching duties (56%).
- Almost all coach practitioners (93%) offer services in addition to coaching. Most frequently, coaches also offer consulting (59%), training (58%), and/or facilitation services (55%). On average, coach practitioners offer almost three (2.8) services in addition to coaching. That is unchanged from 2015 and 2019.

The Client

- In 2022, a little over one in two coach practitioners said their clients are mostly managers (31%) or executives (25%). The combined total of 56% represents an increase compared with 2019 (52%).
- The mix of clients varies with the attributes of coaches, including the region in which they live, their main area of coaching, years of experience, age, gender, and whether they work as an external or internal coach practitioner.

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- On average, coach practitioners said that 57% of their clients are sponsored and 43% are primary clients. Compared to 2019, the sponsored share has increased (up from 52%) while the primary share has fallen (from 48%).
- The majority of coaching clients (58%) are female. When compared with 2019, the average female share of clients has not changed significantly (57% in 2019).
- Clients aged between 35 and 44 years (37%) are most frequently in receipt of coaching services, followed by clients in the 45–54 age range (32%). Around one in five (21%) are aged under 35 years. The age composition of coaches' clients in 2022 was very similar to the position in 2019.

Memberships and Credentials

- The overwhelming majority of coaches (80%) agree that their clients expect coaches to be certified/credentialed, with 42% strongly agreeing and 38% somewhat agreeing.
- More than eight in 10 coach practitioners (86%) said they are a member of one or more coaching organizations, up from 79% in 2015 and 82% in 2019.
- An increasing proportion of coach practitioners hold a certification/credential from a coaching organization. In the 2022 survey, 85% said they currently hold a certification/credential from a coaching organization, up from 69% in 2015 and 74% in 2019.

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GLOBAL
COACHING
STUDY

2023 Final Report

Technical Appendix

Technical Appendix

Introduction

This section presents the approach to the *2023 ICF Global Coaching Study*, under the following headings:

- Questionnaire design.
- Definitions.
- Survey fieldwork.
- Survey outcomes.
- Quantitative indicators.
- Number of coaches: Estimation.
- Number of coaches: Membership ratio method.
- Secondary data sources.
- Comparability.

Questionnaire Design

The questionnaire used for the *2023 ICF Global Coaching Study* is very similar to the instrument employed for the 2012, 2016 and 2020 studies, enabling comparisons across a range of topics.

The first set of questions is designed to screen for those who consider themselves to be coach practitioners or managers/leaders using coaching skills.

For that purpose, respondents were first asked if they considered themselves to be a professional coach. All survey respondents were then asked to describe 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.

No further questions were asked of those responding, "None of the above."

The remainder of the questionnaire was organized into four main sections:

The coach. Following the screening questions, the first set of questions asked all respondents to provide information relating to their location, gender, age, whether they are currently a member of any professional coaching organizations, and whether they have credentials from a coaching organization. Respondents who self-identified as coach practitioners were asked additional questions, including the number of years they have been working as a coach and their main coaching specialty. Coach practitioners were also asked about their current level of coaching activity. Those with active clients at the time of the survey were asked about their hours per week working as a coach.

The client. The second set of questions was posed only to active coach practitioners, with one or more clients at the time of the survey. They were asked about the people to whom they provide coaching services, including the title/position held by the majority of their clients, number of active clients currently coaching, and a demographic profile of clients by age and gender.

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The size of the profession. This section asked active coach practitioners to provide details of their annual revenue or income generated by coaching only and the average fee for a one-hour coaching session, as well as looking ahead over the next 12 months, expected trends in numbers of clients, average fees, coaching sessions, and annual revenue/income.

Future of coaching. The final section sought the views of all respondents on a range of issues affecting the future of coaching as it emerges from the COVID-19 pandemic. The topics included plans for growing their coaching business over the next 12 months and looking ahead 3-5 years, delivery of coaching services, the role of technology in the coaching profession, the potential use of artificial intelligence (AI) and the emergence of digital coaching platforms. The remaining questions asked about factors that give rise to concerns about business prospects and opportunities for coaching over the next 12 months.

Definitions

To ensure a consistent approach to the survey questions, the following definitions were presented to the survey respondents in a glossary and also prompted with hover buttons at appropriate stages in the questionnaire:

Accredited coach training program – Any program consisting of coach-specific training that has met the rigid criteria required to be approved by a professional coaching organization.

Active client – Any client to whom the coach is providing coaching services at the time of the survey.

Client – The person who is being coached.

Coaching – Partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.

Coach practitioner – Someone who provides an ongoing partnership designed to help clients produce fulfilling results in their personal and professional lives. The coach's job is to provide support to enhance the skills, resources, and creativity that the client already has.

Coaching sponsor – The organization or individual paying for the client's coaching.

Coach-specific training – Training that teaches coaching skills and/or how to apply technical skills in a coach-like manner and encompasses theories and core coaching competencies designed to prepare an individual to practice as a professional coach.

External coach – A professional coach practitioner who is either self-employed or partners with other professional coaches to form a coaching business.

Internal coach – A professional coach practitioner who is employed within an organization and has specific coaching responsibilities identified in their job description.

Manager/leader using coaching skills – A leader who uses coaching knowledge, approaches, and skills to create awareness and support behavioral change.

Survey Fieldwork

The survey fieldwork phase commenced on October 26, 2022. The survey ran for six weeks and closed on December 2, 2022.

A number of approaches were deployed to reengage worldwide with coach practitioners and managers/leaders using coaching skills.

ICF's extensive contacts lists were used to circulate personalized invitations and survey links. In addition to current ICF members, invitations to participate in the survey were sent to non-members holding ICF

credentials, expired ICF members, and other databases existing within ICF, such as inquiries regarding membership, credentialing/certification, and location of ICF chapters.

ICF members were asked to send a generic link to the online survey registration site with their wider networks of coaches; the intention of which was to initiate a "snowball" effect that would attract more non-ICF coaches.

In addition, the survey was implemented to ensure that it was readily accessible to all potential respondents. Thus, the survey was made available online in nine languages (English, French, German, Italian, Japanese, Korean, Portuguese, Mandarin, and Spanish).

Also, the survey was designed so that it could be completed using a range of mobile devices. Participation was encouraged by designing the survey to be completed by using QR codes and in a manner compatible with most mobile phones and tablets.

Survey Outcomes

A total of 15,384 individuals registered online to take part in the survey. Of these, 14,591 (95%) provided valid responses. A valid response was required to meet each of the following conditions:

- The respondent identified as a coach practitioner or a manager/leader using coaching skills. The screening question was located at the start of the questionnaire.
- The respondent completed the questionnaire in full (12,587 responses) or completed at least the first section of the questionnaire (2,004 responses). In addition to key demographics, valid responses were required to include, the respondent's status regarding membership of professional coaching organizations for use in the methodology underpinning the estimation of the global number of coaches (set out later in this appendix).

Of the 14,591 valid responses, 13,146 (90%) were provided by coach practitioners and 1,445 (10%) from managers/leaders using coaching skills.

Respondents identifying themselves as ICF members accounted for 11,202 responses, representing 77% of the total.

Regional Classification

Valid responses were received from 153 countries. Over 100 survey returns were received from 27 countries spread across all the major world regions. Notwithstanding a shorter survey period of six weeks, compared with six-month period for previous surveys, the global spread of the 2023 study sample is comparable with the reach achieved in the 2020 study and wider than the 2012 and 2016 studies. That is testimony to the success of the methods described above to reach the global coaching community and facilitate participation in the study.

Geographical spread of survey returns for the *2023 ICF Global Coaching Study*

Survey returns	2023 Countries and Territories	2020 Countries and Territories	2016 Countries and Territories	2012 Countries and Territories
100+	27	52	40	31
50-99	19	8	8	7
Fewer than 50	107	101	89	79
Total	**153**	**161**	**137**	**117**
Valid responses	*14,591*	*22,457*	*15,380*	*12,133*

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For reporting purposes, the 153 participating countries were classified into seven world regions. The classifications were designed both to reflect geographical proximity and to ensure sample bases were large enough for detailed statistical analysis. The seven world regions are as follows:

Region	Comprises	Number of responses	% of responses
Asia	The continent of Asia, except those countries classified to Eastern Europe and the Middle East and Africa regions.	1,774	12
Latin America and the Caribbean	South America, Central America, and the Caribbean (including Puerto Rico, on the basis of its central location in the Caribbean).	1,121	8
Middle East and Africa	The continent of Africa plus the Gulf States.	950	7
North America	U.S. and Canada.	5,966	41
Oceania	Based on the United Nations classification. Mainly Australia and New Zealand, including also the Pacific Island groupings of Melanesia, Micronesia, and Polynesia.	483	3
Western Europe	Bounded to the east by Germany and Austria, with Finland included in this grouping to preserve the Nordic cluster.	3,484	24
Eastern Europe	The remainder of continental Europe and Russia. This region includes also a number of countries which are geographically part of the continent of Asia (e.g., Turkey, Armenia, Azerbaijan, Georgia), but which have various political and cultural links to Europe (e.g., membership of the Council of Europe and also UEFA, the European football association).	813	6
All		**14,591**	**100**

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Valid survey responses by ICF membership

	All		ICF members		Non-ICF members	
Region	*#*	*% of global*	*#*	*% of global*	*#*	*% of global*
Asia	1,774	12	1,340	12	434	13
Eastern Europe	813	6	597	5	216	6
Latin America and the Caribbean	1,121	8	657	6	464	14
Middle East and Africa	950	7	655	6	295	9
North America	5,966	41	4,929	44	1,037	31
Oceania	483	3	363	3	120	4
Western Europe	3,484	24	2,661	24	823	24
All	**14,591**	**100**	**11,202**	**100**	**3,389**	**100**

Valid survey responses by type

	All		Coach practitioners		Managers using coaching skills	
Region	*#*	*% of global*	*#*	*% of global*	*#*	*% of global*
Asia	1,774	12	1,479	11	295	20
Eastern Europe	813	6	698	5	115	8
Latin America and the Caribbean	1,121	8	987	8	134	9
Middle East and Africa	950	7	771	6	179	12
North America	5,966	41	5,565	42	401	28
Oceania	483	3	435	3	48	3
Western Europe	3,484	24	3,211	24	273	19
All	**14,591**	**100**	**13,146**	**100**	**1,445**	**100**

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Number of Coaches: Estimation

While coaching truly is a global profession, there are no definitive and accepted lists or counts of the total number of coaches, whether by country, world region, or worldwide.

To estimate the number of coaches, one possible approach would be to compile a list of all coaching-related membership associations and obtain counts of the number of coaches within each association. However, that approach would encounter a number of problems, including:

- Counting those with no professional affiliation. Not all coaches belong to membership associations.
- Membership overlaps. Some coaches belong to more than one association. In that instance, there is a risk of double-counting coaches with more than one membership.
- Defining the universe of coaching-related membership associations. Some associations focus exclusively on coach practitioners. Others embrace coaches within a broader scope or through other organizations that intersect with coaching.

Those issues are illustrated in the diagram below. Thus, the totality of membership affiliations encompasses: ICF memberships, other coaching organizations with an international membership, and organizations with a country-specific orientation.

Number of Coaches: Membership Ratio Method

A second approach is to implement the membership ratio approach to the estimation problem.

Consider the situation where a random sample is taken from the population of coaches and information is obtained on membership of coaching-related associations, including overlaps and non-membership. In that circumstance, an estimate for the total number of coaches can be derived as follows.

First, obtain information on the total number of coaches within one of the subgroupings illustrated in the membership-based framework, e.g., ICF membership or the composite other international associations. For that reference subgroup, the survey returns can then be scaled up to the relevant total number of memberships.

Second, from the survey data, for each other membership sub-group, calculate the ratio of survey returns from that sub-group to the number of returns in the reference subgroup and use that ratio to scale up to an estimate for the number of memberships in that non-reference subgroup.

Third, from the survey data, estimate the incidence of membership overlaps between population subgroups and subtract the scaled-up number of overlaps from the membership estimates to arrive at an estimate for the number of coaches, to avoid double-counting memberships.

The approach can be illustrated with the following example. Assume there are just two membership groups, A and B. Let A be the reference group and suppose that total membership in A is known to be 5,000. Membership in B is not known and must be estimated. The overlap between the two memberships must also be estimated to derive an estimate for the number of individual coaches.

Suppose a random sample survey is undertaken to make the required estimates. When the survey is drawn, it is found that 1,000 respondents say they have membership in group A and 2,000 in group B, including 270 (representing 10% of the total sample) who say they are members of both A and B.

The survey-based ratio of memberships in B to those in A is 2:1. Applying that ratio to the total membership in A gives an estimated membership in B of 10,000 (i.e., 5,000 multiplied by 2). The combined membership total for groups A and B is then 15,000. From the survey returns, 10% are members of both A and B. Applying that proportion to the estimated total membership gives an estimated 1,500 overlaps in the population. Subtracting the overlap estimate from the 15,000 total memberships gives an estimated 13,500 individual coaches in the combined groups A and B.

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Memberships in the *Global Coaching Study*

A singular advantage of the questionnaire design for the *Global Coaching Study* is that it is possible to map from the survey returns to the membership-based framework as a basis for estimating the total number of coaches. Specifically, information is available on membership overlaps and non-membership.

In addition to what is confirmed membership (ICF), the survey asked respondents to indicate their membership of a number of other international associations:

- Asia Pacific Alliance of Coaches (APAC).
- Association for Coaching (AC).
- Association for Professional Executive Coaching and Supervision (APECS).
- Coaches and Mentors of South Africa (COMENSA).
- European Mentoring and Coaching Council (EMCC).
- International Association of Coaching (IAC).
- Worldwide Association of Business Coaches (WABC).
- Federacion Internacional de Coaching Ontológico Profesional (FICOP).
- Institute of Coaching (IOC).
- International Coaching Community (ICC).

A total of 1,935 respondents indicated membership of these other international associations. Country-specific, regional, and various other memberships were indicated by 983 respondents. A total of 1,772 survey respondents said they had membership of more than one organization (including ICF). In addition, 2,346 said they were not in any association. The survey results are illustrated in the diagram below.

Modified Membership Ratio Method

The membership responses from the 2022 survey provide the basis for implementing the membership ratio method approach to estimating the worldwide total number of professional coaches. The key issue is the choice of a reference group.

As the ICF member count is already known (55,480), it would seem that ICF memberships should serve as the reference group. However, the survey sample is heavily skewed towards ICF members (77% of the valid responses). This naturally reflects the use of the ICF member and other datasets for contacting potential respondents and issuing periodic reminders.

Consequently, designating ICF as the reference group would inevitably lead to an underestimate of the required membership ratios relative to other subgroups, thereby underestimating the total number of coaches in the population.

Nonetheless, since the ICF membership count is already known, the membership ratio method can be modified to focus on the remaining subgroups.

From publicly available sources, it was possible to compile an estimate for the total number of memberships within the other international associations listed previously. For that reason, the combined other international associations subgroup was chosen as the reference group for the application of the ratio method, as outlined above, to estimating the number of coaches in the remaining subgroups, i.e., country/regional/other memberships and no memberships.

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The Number of Coaches: Estimates

The combined membership of other international associations is estimated at 31,160, in net terms, after excluding overlapping memberships (an estimated 5,500). Applying the survey ratios to the remaining subgroups, the estimated grossed-up numbers of coaches in the remaining membership categories (excluding ICF) are shown in the accompanying table.

From the survey data, there are an estimated 13,720 overlaps between ICF, the combined other international organizations, and the country/other membership organizations.

When the membership subgroups are added together, and after subtracting the overlaps, it is estimated that there are presently in the region of 111,470 coach practitioners worldwide, including 1,370 saying they are retired (the estimate for retired coaches is not included in the figures presented in Section 2 for the size and scope of the profession).

The methodology also yields an indicative figure for 13,320 managers/leaders using coaching skills. That estimate should be viewed as strictly indicative and subject to a higher level of uncertainty than the figures for coach practitioners. The indicative nature of the figures presented for managers/leaders derives from the fact that the survey data collection has relied primarily on contact lists related to coaching memberships and credentials as well as snowballing via coaching networks. Managers/leaders use coaching skills within the workplace or organizational setting. It is therefore likely that an approach based on coaching-related lists and networks will underestimate the number of managers and leaders who use coaching skills.

Estimated individuals in the coaching continuum worldwide, by membership

	All	**Coach practitioners**	**Managers/leaders using coaching skills**	**Active clients currently coaching (average)**
Memberships	#	#	#	#
ICF	55,480	51,660	3,820	8.4
Other international organizations	31,160	29,430	1,720	10.2
Country/other organizations	13,450	12,430	1,020	11
None	38,420	31,170	7,250	13.5
Overlap adjustment	-13,720	-13,220	-500	13.8
Total	**124,780**	**111,470**	**13,320**	**11.5**

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Estimated individuals in the coaching continuum worldwide, by membership

	All	Coach practitioners	Managers/leaders using coaching skills	Active clients currently coaching (average)
Memberships	*%*	*%*	*%*	*#*
ICF	44	46	29	8.4
Other international organizations	25	26	13	10.2
Country/other organizations	11	11	8	11
None	31	28	54	13.5
Overlap adjustment	-11	-12	-4	13.8
Total	**100**	**100**	**100**	**11.5**

The key strengths of the modified ratio method approach to estimating the number of coaches are as follows:

- The modified membership ratio method is a data-driven approach that takes account of a range of data sources.
- The availability of counts from the ICF member dataset serves to confine the estimation problem to the remaining membership subgroups.
- The ICF database anchors the overall estimate in a robust membership count, with over 55,480 members estimated to account for 44% of the global total.
- The large scale of the *2023 ICF Global Coaching Study*, including 3,389 responses from non-ICF members.
- The ability to map from the survey returns to the membership-based framework that is required for the application of the ratio method.

Taking all of the above into consideration, the figure of 111,470 would seem to be a reasonable estimate for the worldwide number of coach practitioners.

Nonetheless, it is important to recognize the uncertainties that inevitably arise with a survey-based estimation methodology, as follows:

- The estimation method depends on ratios derived from a sample survey of coaches. The survey-derived ratios will therefore be subject to variability arising from the survey process.
- Reflecting the above, estimates for the number of coaches have been prepared for the world regions only and not for individual countries.
- The implicit assumption that survey returns from those with a non-ICF membership status constitute representative samples from the relevant subpopulations. This assumption cannot strictly be validated. However, it would not appear unreasonable. For example, the survey returns from each of the other membership subgroups were widely dispersed geographically. Each subgroup was represented in each of the world regions. The returns from members of other international associations and those with country/regional/other affiliations were drawn from 100 and 76 countries respectively. For those with no membership affiliation, 112 countries were represented.
- The accuracy of the estimated number of coaches will in turn reflect the accuracy of the data inputs, including both the survey returns and the estimated combined memberships of other international associations. The latter were extracted from publicly available sources and should provide a reasonable guide, albeit their precision cannot be verified. This serves to further underscore the importance of the ICF member dataset as an anchor for the estimation approach.
- The estimate for the worldwide number of coaches is valid at a point in time.

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Quantitative Indicators

The *2023 ICF Global Coaching Study* sought information on four quantitative indicators (e.g., revenues, fees per one-hour session, hours per week working as a coach, and currently active clients). Information on these indicators was sought from active coach *practitioners only*, (i.e., those currently with one or more clients).

Overall, the survey achieved high response rates to the quantitative indicators. Almost all active coaches gave information on clients and hours. Not unexpectedly, response rates were lower for questions relating to financial information. However, 80% of active coach practitioners supplied annual revenue/income from coaching data while 81% gave an average fee per one-hour session. That level of response is high enough to ensure a representative picture.

The survey returns for each of the quantitative indicators were also subjected to rigorous quality assurance. Due to the range of currencies in a global survey, financial information was sought both in numeric and text form. Extensive visual checks were undertaken to identify erroneous entries.

All quantitative indicators were also subjected to box plot analysis to identify data outliers, both for quality assurance purposes and to assist with the further analysis of the data.

Quantitative indicators (Base = active coach practitioners only)

	Responses	
	Coach practitioners	*% of active coaches*
Annual revenue/income from coaching	9,504	80
Average fee for one-hour coaching session	9,601	81
Active clients	11,608	98
Hours per week working as a coach	11,752	99
Active coaches	11,890	100

The annual revenue/income from coaching responses included 3.5% returning a zero value, mainly respondents providing internal coaching services and stating that they receive a salary. Those zero-valued responses were omitted from the estimates for annual revenue/income discussed in Sections 2 and 3 of this report.

For similar reasons, 2.4% of the responses provided for the average fee for one-hour coaching sessions were zero-valued. Again, those values were omitted from the estimates presented in Sections 2 and 3 of this report.

Total revenues/income from coaching are derived by multiplying the estimates for average annual revenue/income by the number of active coach practitioners. As a conservative measure, to avoid overstating global and regional revenue/income, the total revenue/income estimates were adjusted to allow for the proportion of survey respondents citing a zero value for their revenue/income from coaching.

Secondary Data Sources

The World Bank country dataset (see http://data.worldbank.org/) was the main source of information for the following indicators which were used in the further analysis of the survey data:

- Exchange rates for converting revenues and fees to US dollars.
- Purchasing power parity (PPP) conversion factors, defined by the World Bank as "the number of units of a country's currency required to buy the same amounts of goods and services in the domestic market as a U.S. dollar would buy in the United States."

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The World Bank indicator dataset was accessed in January 2023. Data were extracted at country level and aggregated into the world regional groupings outlined above.

As of January 2023, World Bank data were available on the foregoing indicators for the majority of countries through December 2021. Where data for a country was not available through 2021, the World Bank data were updated using the relevant indicators from the International Monetary Fund (IMF) October 2022 World Economic Outlook (WEO) database (available at https://www.imf.org/en/Publications/WEO/Issues/2022/10/11/world-economic-outlook-october-2022).

Comparability

The following points should be noted in drawing comparisons between the 2023 study and the previous 2020, 2016, and 2012 studies.

Questionnaire design. The 2023 study is fully comparable with the 2016 and 2020 studies in relation to the key definitions, i.e., professional coaches and the coaching continuum (coach practitioners and managers/leaders using coaching skills).

The coaching continuum definitions were first implemented in the 2016 study. Hence, the 2012 study does not contain information relating to those definitions.

All four studies employ the same definition of an active coach, i.e., with active clients at the time the survey was undertaken.

Survey fieldwork period. The survey for the 2023 study was implemented over a six-week period. By comparison, the previous studies were conducted over a six-month period. The shorter fieldwork duration is evident in two main respects.

First, the ICF member share of total survey responses is higher in the 2023 study by comparison with the previous studies, up from 68% in the 2020 study to 77% in the 2023 study. That shift in the ICF share does not affect the estimate for the global number of coaches. As described above, in the modified membership ratio method, other international organizations are used as the reference group for estimating the number of coaches. It is possible that the increase in the ICF share may affect survey averages, which are unweighted. Any such effects are mitigated by the global spread of the ICF membership, with one or more members in 168 countries and one or more survey responses received from 141 countries.

Share of survey responses, 2023 and 2020 Studies compared

	2020 Study	2023 Study	Difference
	%	*%*	*percentage points*
ICF members	68	77	+9
Managers/leaders using coaching skills	17	10	-7

Second, the proportion of survey respondents describing themselves as managers/leaders using coaching skills fell from 17% in the 2020 study to 10% in the 2023 study. With a shorter survey fieldwork timeframe, it is likely that there was less scope for ”snowballing” effects to elicit higher levels of participation by managers/leaders using coaching skills. It is, however, important to note that managers/leaders using coaching skills are not included within the scope of the coaching business indicators (revenues, fees, etc.) that are the main focus of this report. Though, the lower survey share serves to reinforce the point made previously regarding the likely underestimation of the number of managers/leaders using coaching skills.

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Global revenue. As in the previous studies, the global revenue figure was derived by first converting annual revenue/income reported by coaches in their own currencies to U.S. dollars and then grossing up from the estimated numbers of active coaches. The basic methodology has therefore remained unchanged.

The revenue/income figures were converted to U.S. dollars based on international exchange rates published by the World Bank. The conversion to U.S. dollars provides a common standard for comparisons across regions at a given point in time, i.e., the set of prevailing exchange rates.

Thus, revenue comparisons between the studies will be affected by fluctuations in exchange rates. Nonetheless, the comparisons between the 2023 and 2020 studies are not hugely affected by exchange rate movements over the intervening period.

At the global level, average annual revenue/income from coaching is estimated to have risen by 12% between 2019 and 2022 based on the December 2021 exchange rates. That does not differ greatly from the 10% increase that would be estimated if the USD exchange rate had not changed at all between December 2018 (the basis for the revenue figures reported in the 2020 study) and December 2021.

Exchange rate movements had a discernible effect on the estimated growth in annual revenue/income from coaching between 2019 and 2022 for Latin America and the Caribbean. In that region, the USD has noticeably strengthened. Consequently, the estimated growth in average revenue/income is lower on the December 2021 exchange rates (+10%) by comparison with the average that would result if measured at the December 2018 exchange rates.

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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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