COVID-19
AND THE
COACHING INDUSTRY

2021 ICF GLOBAL SNAPSHOT SURVEY RESULTS

International Coaching Federation

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INTRODUCTION

This report presents the findings from the second Global Snapshot Survey conducted in early 2021 to assess the impact of the COVID-19 pandemic on the coaching community. The study was commissioned by the International Coaching Federation (ICF) and undertaken by PricewaterhouseCoopers (PwC).

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 35,000 trained personal and business coaches located in over 140 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.

Just weeks after the *2019 ICF Global Coaching Survey* was closed in December 2019, the outbreak of COVID-19 began to affect members of the coaching community. On 11 March 2020, the World Health Organization announced the COVID-19 outbreak as a pandemic. Since then, it has had a dramatic impact on the way coaches and clients live, work and connect with one another around the world.

The *2020 ICF Global Coaching Study* has enormous relevance as a benchmark: It is the last and best possible snapshot of the coaching industry, pre-pandemic. However, it is no longer a current snapshot. It is a picture of **what was**.

To better understand **what is**, ICF commissioned PwC to conduct a snapshot survey in mid-2020 designed to assess the impact of the pandemic on the coaching industry worldwide. The findings from the first COVID-19 Global Snapshot Survey were published by ICF in September 2020.

With the pandemic lasting throughout 2020 and into 2021, this second Global Snapshot Survey was conducted to provide an update on the continuing impacts of the pandemic on the coaching profession.

The survey was open to professional coach practitioners and to managers and leaders who use coaching skills in their roles. This report presents only the findings regarding coach practitioners.

Objectives

The goal of the survey was to collect up-to-date information on the state of the coaching industry worldwide, enabling some comparison with the findings published in the *2020 COVID-19 Global Snapshot Survey*.

The objectives of the survey were to identify:

- The prevalence of effects experienced by individual members of the coaching industry.
- The impact of the pandemic on key business indicators (i.e., income/revenue from coaching, fee per one-hour coaching session, clients and weekly hours).
- Changes coach practitioners have made to their business practices, both in terms of the mix of services they offer and how they interact with clients.
- Perspectives on how the coaching industry might change or adapt to the ongoing pandemic over the next six months.
- The major obstacles for the coaching industry over the next 12 months.

Questionnaire Design

The survey included two main parts: demographics and COVID-19 impact assessment.

The demographics module included questions that appeared on the *2019 ICF Global Coaching Survey* and collected information about respondents' self-identification (coach practitioner or manager/leader using coaching skills), location, age, education and coaching experience.

The COVID-19 module assessed the impact of the pandemic on coach practitioners' business, practice and perspectives on the coaching industry.

Survey Process

The survey was open online from January 18 – February 22, 2021. The questionnaire was available in nine languages: English, French, German, Italian, Japanese, Korean, Simplified Chinese, Portuguese and Spanish.

Survey participation was sought across three streams:

- Respondents to the *2019 ICF Global Coaching Survey* who had given their consent to participate in a further global coaching study.
- The set of individuals who had been invited to participate in the *2019 ICF Global Coaching Survey* but who did not ultimately provide a response.
- New members to join ICF between June 2020 and January 2021.
- Visitors to an open registration website.

The first two streams were issued with individual personalized links to the online survey. To encourage wider participation via the open registration website, respondents in the first two streams were asked to send a generic link on to their wider networks of coaches; with the intention of initiating a "snowball" effect to help maximize the global reach of the survey.

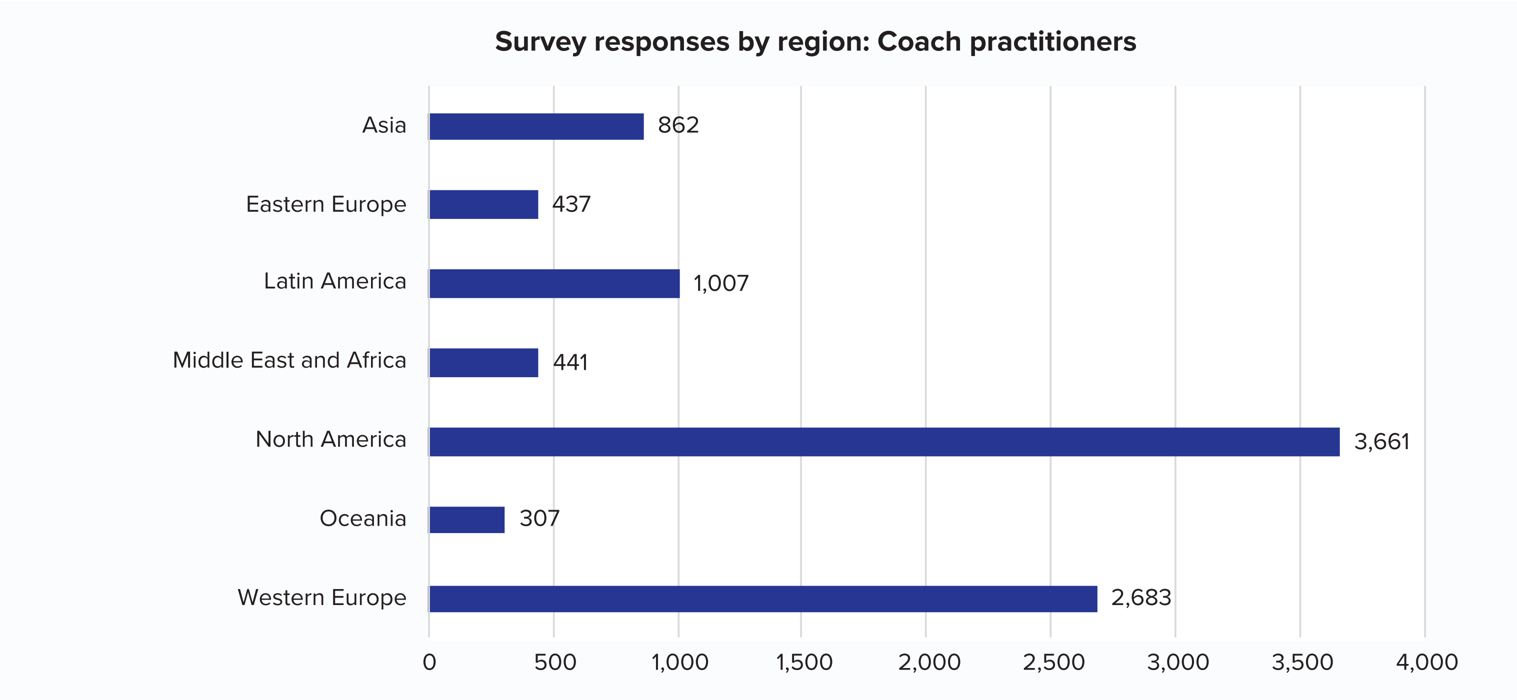
Survey Outcomes

Reflecting the relevance of the topic, a large and truly global number of surveys were completed. In total, 10,445 survey responses were received, from 148 countries and territories across the seven world regions. Of those, 9,398 surveys were completed by the coach practitioners who are the focus of this report.

The out-turn for the update survey represents an increase of 459 on the 8,939 coach practitioners who participated in the first Global Snapshot Survey, which ran from mid-June 2020 to mid-July 2020.

Where comparisons are drawn, the Snapshot Surveys are distinguished according to their timing. That is, the first Global Snapshot Survey refers to the period from the start of the pandemic to mid-2020, while the update survey covers the period to early 2021.

The largest number of coach practitioner responses to the update survey was received from North America (3,661), followed by Western Europe (2,683) and Latin America and the Caribbean (1,007). Though, substantial numbers of responses were received from each of the remaining four regions, large enough to enable regional breakdowns of the results to be presented in this report.



Structure of the Report

The remainder of this report is organized as follows.

Section 2 reports on the direct impacts of the pandemic on coach practitioners, including income and employment effects and changes to the number of clients, hours spent coaching and income/revenue from coaching. This section also reports on coach practitioners' expectations regarding the potential impact of vaccine roll-out.

Section 3 examines how coach practitioners have responded to the pandemic, under a range of headings, including: receipt of training, changes to services offered and changes in the methods used to coach clients.

Section 4 looks ahead to the next six to 12 months across a range of topics, including confidence in respondents' own prospects and the outlook for the coaching industry.

For the purposes of this report, the two COVID-19 Snapshot Surveys which ICF commissioned PwC will be referred to as:
Mid-2020 Survey: conducted June/July 2020
Early 2021 Survey: conducted January/February 2021

SECTION 2: IMPACTS

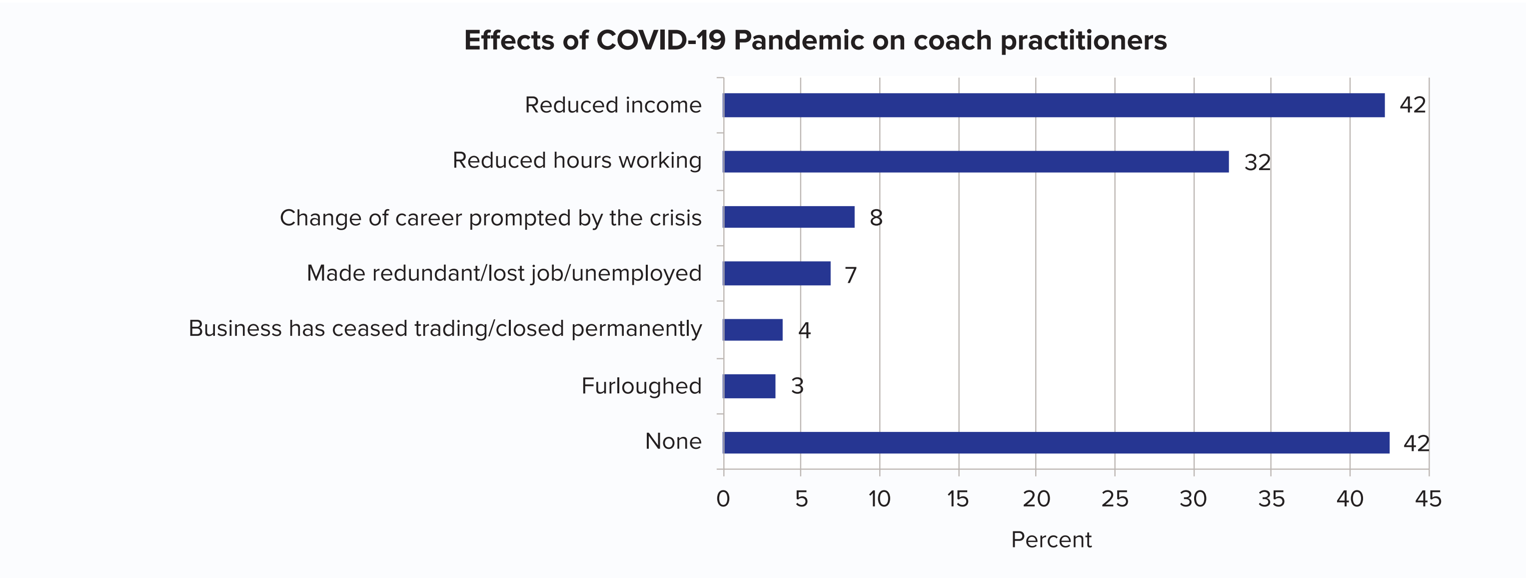
Introduction

This section reports on the direct impact of the pandemic on coach practitioners, under the following headings:

- Income and employment changes
- Overall impact on coaching practice
- Changes to number of clients, hours spent coaching and revenue since the pandemic started
- Changes since October 2020
- Expected impact of vaccine roll-out

Income and Employment

The majority of coach practitioners (58%) have experienced one or more income and employment effects as a result of the pandemic. Reduced income was the most frequently cited effect (42%) followed by reduced hours working (32%). Those two effects were typically experienced in tandem. Almost three in four coach practitioners with reduced hours (74%) also said they had experienced reduced income.



The findings from the survey conducted in early 2021 would suggest that the effects of the pandemic have moderated when compared with mid-2020, when the first survey was undertaken. For example:

- Fewer coach practitioners reporting reduced income – down from 49% in the mid-2020 survey to 42% in the early 2021 survey.
- The proportion of coach practitioners citing reduced hours working is also down, from 37% in the mid-2020 survey to 32% by the early 2021 survey.

Income and employment effects from the pandemic have been experienced across each of the seven world regions, albeit to varying degrees. Reduced income was reported by around one in two coach practitioners in Asia, Eastern Europe, Middle East and Africa, and Oceania. The income effects were more modest in North America and Western Europe (42%). At 28%, reduced income effects were lowest in Latin America and the Caribbean. However, that same region also reported an above-average occurrence of reduced hours working (36%).

Other effects from the pandemic included:

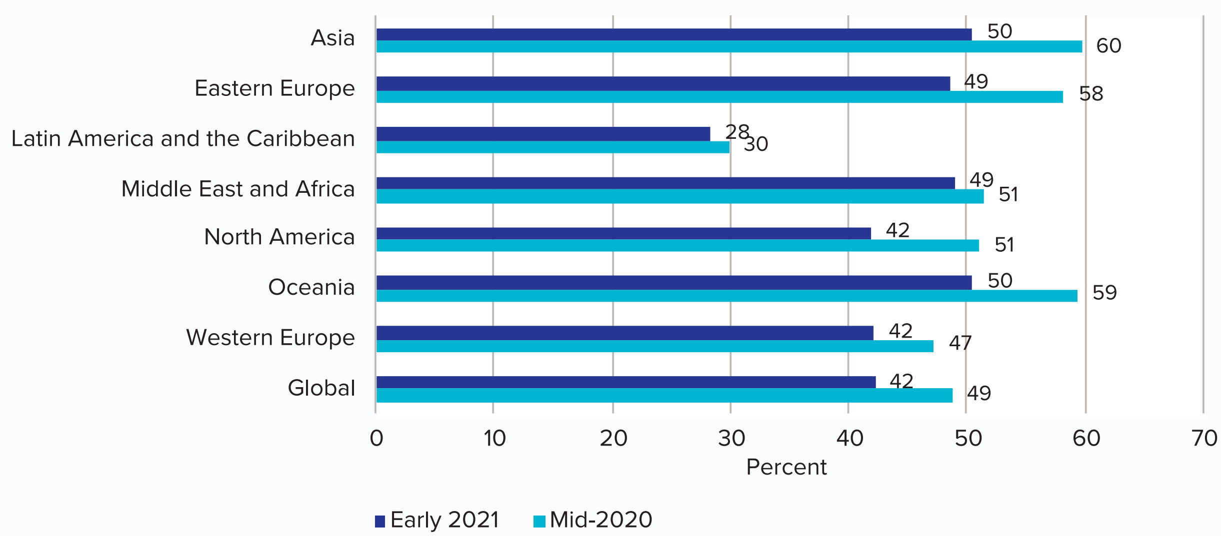
- Change of career – ranging from 7% in North America to 15% in Eastern Europe.
- Job loss – from 6% (Oceania, Western Europe) to 11% (Eastern Europe).
- Business closures – highest in Eastern Europe (13%), to just 1% in North America and Oceania.

Income and employment changes by region

	Asia	Eastern Europe	Latin America and the Caribbean	Middle East and Africa	North America	Oceania	Western Europe
Reduced income	50	49	28	49	42	50	42
Reduced hours working	30	31	36	33	31	38	33
Change of career prompted by the crisis	12	15	10	11	7	10	8
Made redundant/lost job/unemployed	8	11	7	9	7	6	6
Business has ceased trading/closed permanently	8	13	6	9	1	1	3
Furloughed	4	4	3	4	2	1	5
None	37	35	42	35	47	36	41

Both globally and regionally the proportion of coach practitioners reporting reduced income was lower in the early 2021 survey compared to the mid-2020 position. The exceptions are the Middle East and Africa and Latin America and the Caribbean – in both of those regions, the proportions mentioning reduced income fell by just two percentage points.

Coach practitioners reporting reduced income due to pandemic, by region

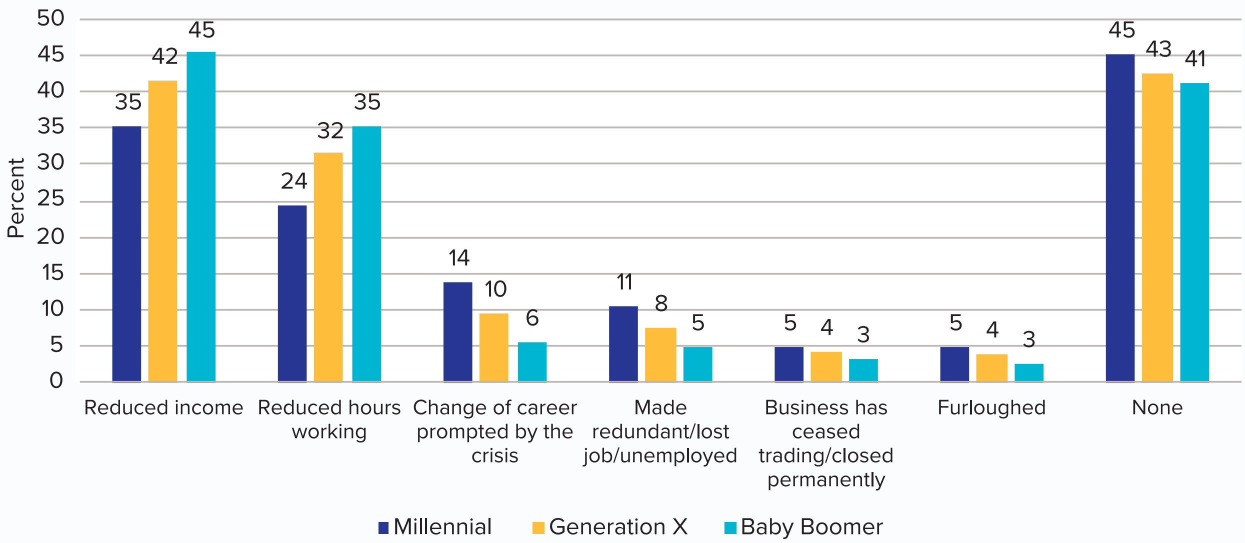


The reported income and employment effects varied by age generation group. Coach practitioners in the Baby Boomer group were most likely to report reduced income (45%) and/or reduced hours working (35%). Millennials were most likely to report that the pandemic prompted a change of career (14%) and/or having lost their job (11%).

Generations by Year

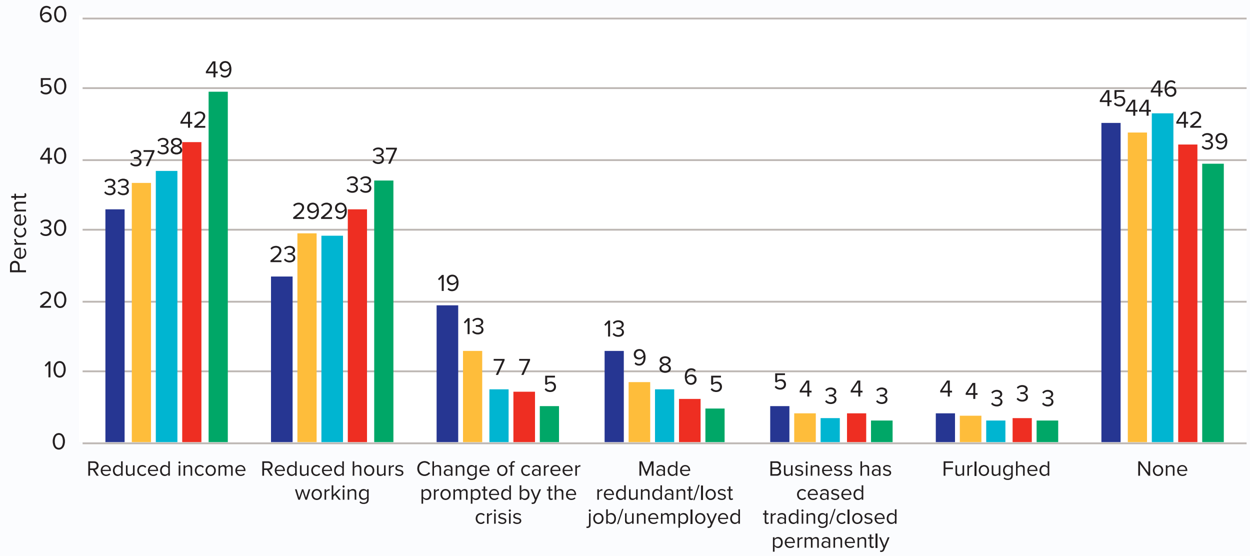
Generations	Birth Years
Generation Z	1997-1999
Millennials	1982-1996
Generation X	1965-1981
Baby Boomers	1946-1964
Greatest Generation	1945 and earlier

Effects of COVID-19 pandemic by generation



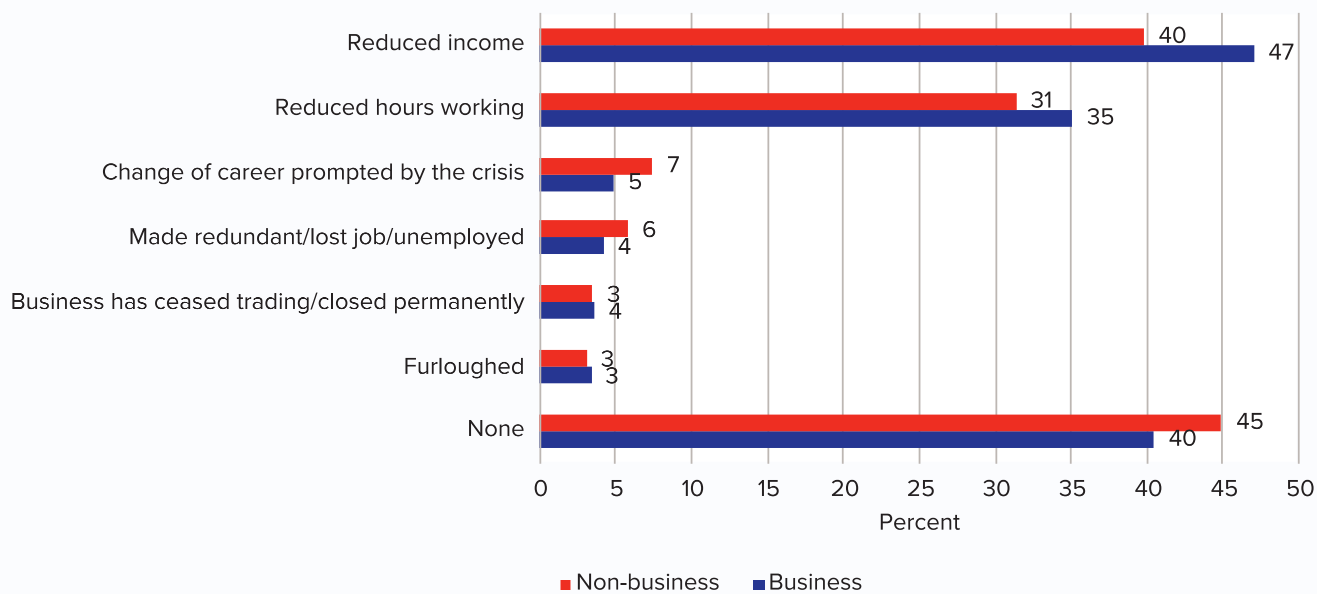
A similar pattern of effects is evident by coaching experience. The greater the number of years coaching, the higher the proportion of coach practitioners with reduced income and/or hours working. Less experienced coach practitioners were more likely to report a change of career and/or a loss of employment.

Effects of COVID-19 pandemic by coaching experience



On average, the effects of the pandemic were felt more strongly by coach practitioners with a business specialty compared to those with a non-business specialty. Mainly, that was due to the higher proportions of business coach practitioners reporting lost income (47% versus 40% of non-business coach practitioners) and/or reduced hours (35% versus 31% of non-business coach practitioners).

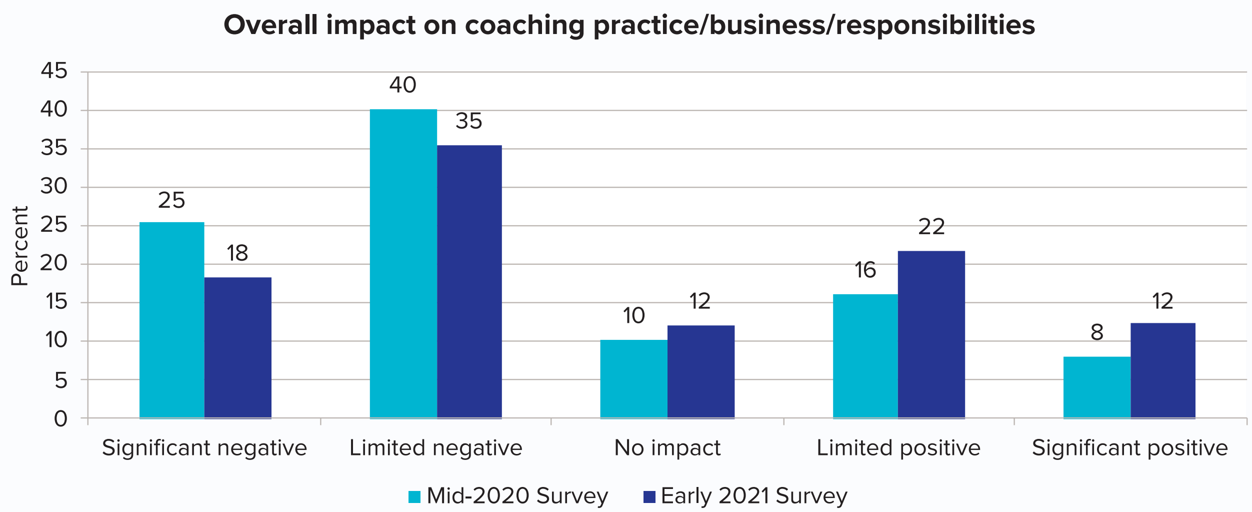
Effects of COVID-19 pandemic by main area of coaching



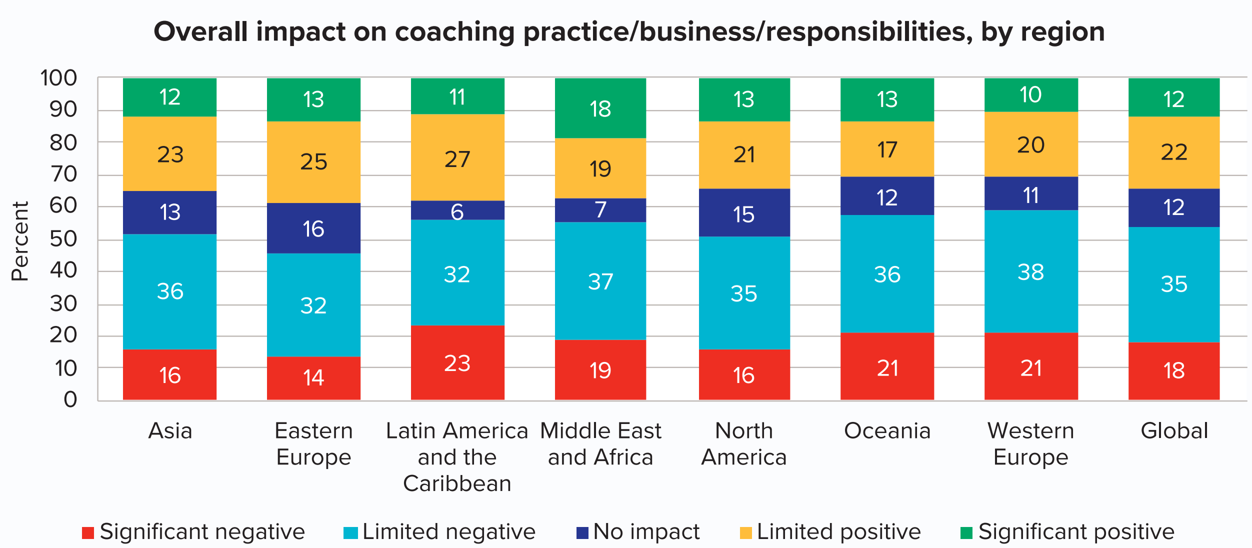
Overall impact

When asked about the overall impact of the pandemic on their coaching practice/business/responsibilities, 18% said they had experienced a significant negative impact with a further 35% reporting a limited negative impact. One in eight said there had been no impact from the pandemic on their coaching practice. A little over one in three coach practitioners (34%) viewed the pandemic as having a positive impact overall

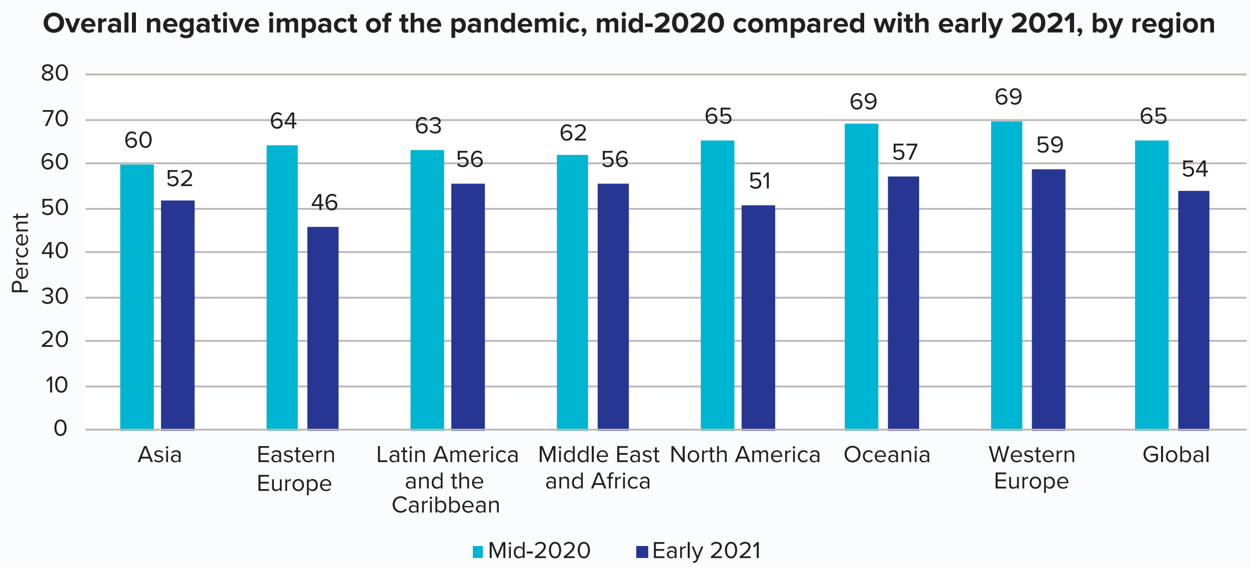
The early 2021 survey results can be compared with the findings from the study conducted in mid-2020. The key point to note from that comparison is the reduction in the proportion of coach practitioners saying the pandemic had a negative effect and the increase in the proportion reporting a positive impact. In mid-2020, 65% of coach practitioners said the impact had been negative (whether significant or limited) compared with 24% citing a positive impact. By early 2021, the proportion saying the impact was negative had dropped to 54% while the proportion with a positive impact had risen to 34%. The improving trend in the impact of the pandemic supports the conclusion drawn above, that is, the adverse impact of the pandemic has moderated in the period between mid-2020 and early 2021.



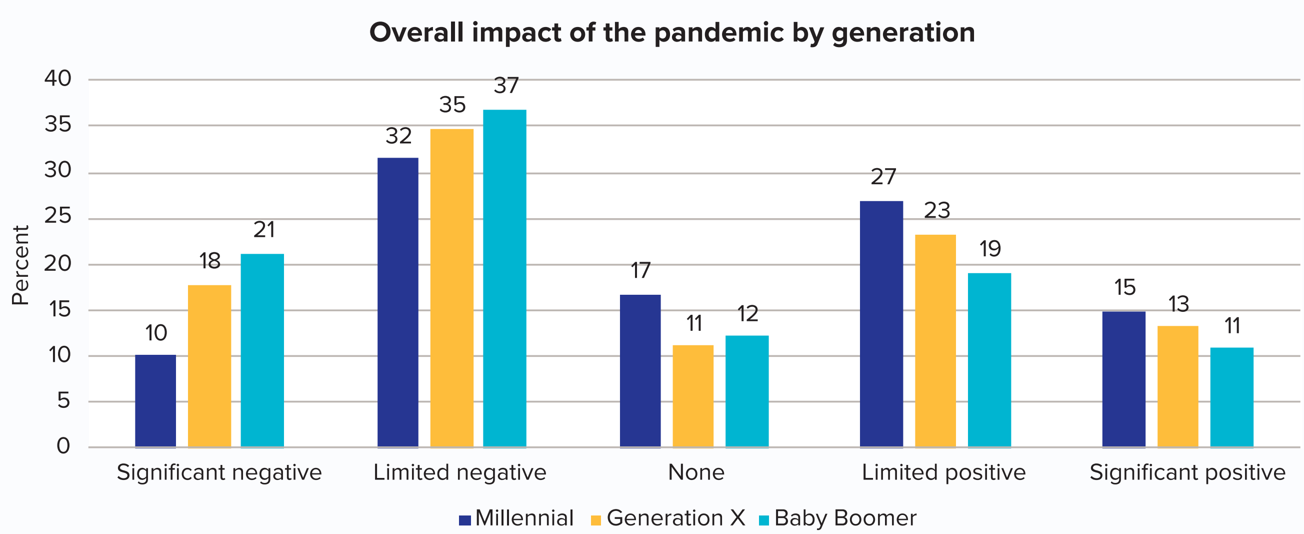
The proportion reporting a significant negative impact ranged from 14% in Eastern Europe to 23% in Latin America and the Caribbean.



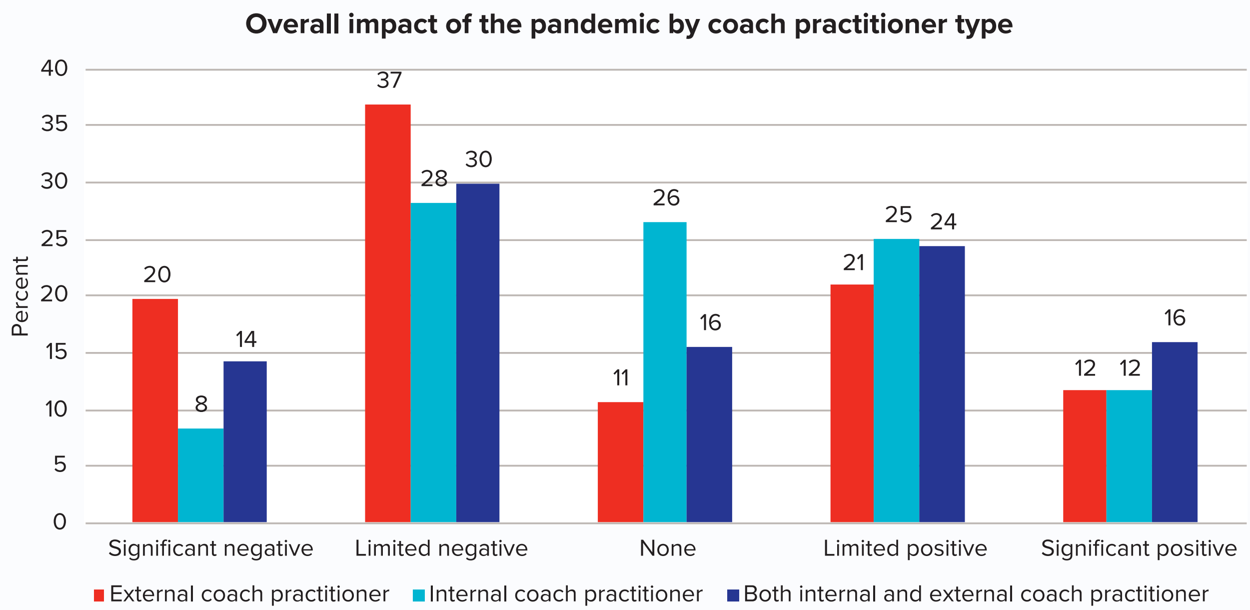
In each of the seven regions, the proportion of coach practitioners reporting a negative impact (whether significant or limited) fell between mid-2020 and early 2021.



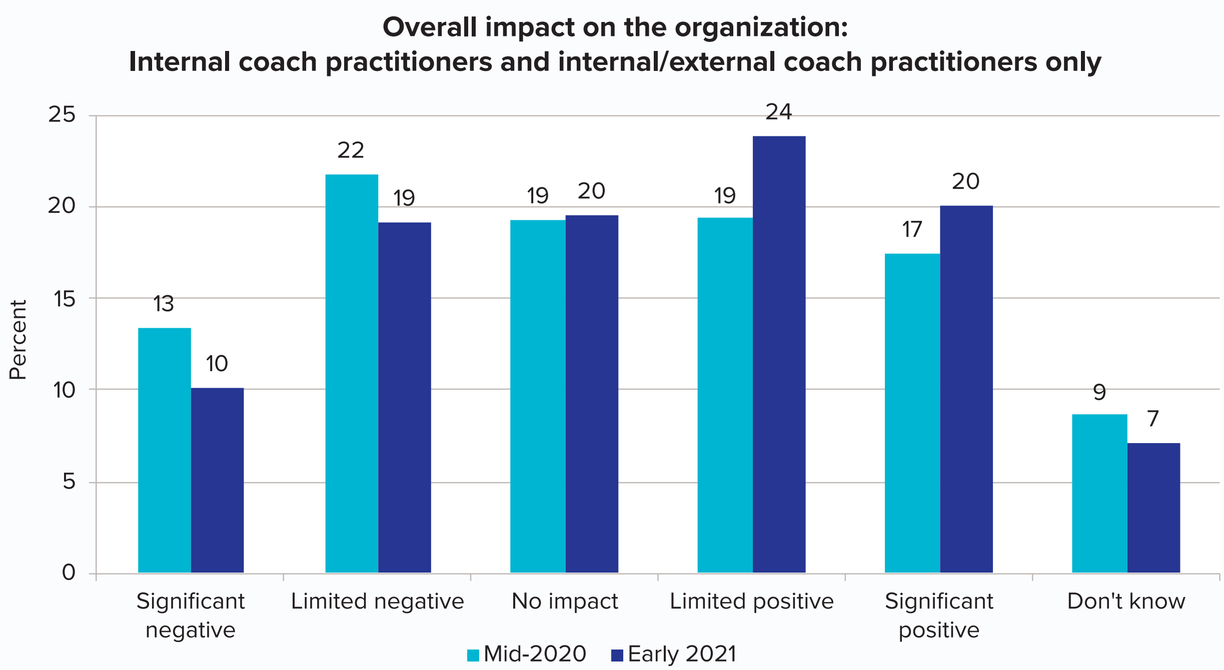
The overall impact of the pandemic has varied by generation. A little over one in five Baby Boomers (21%) said they had experienced a significant negative effect compared with 10% of Millennials.



Significant negative effects were more strongly felt by external coach practitioners (20%) compared with internal coach practitioners (8%) and those who coach both internally and externally (14%).

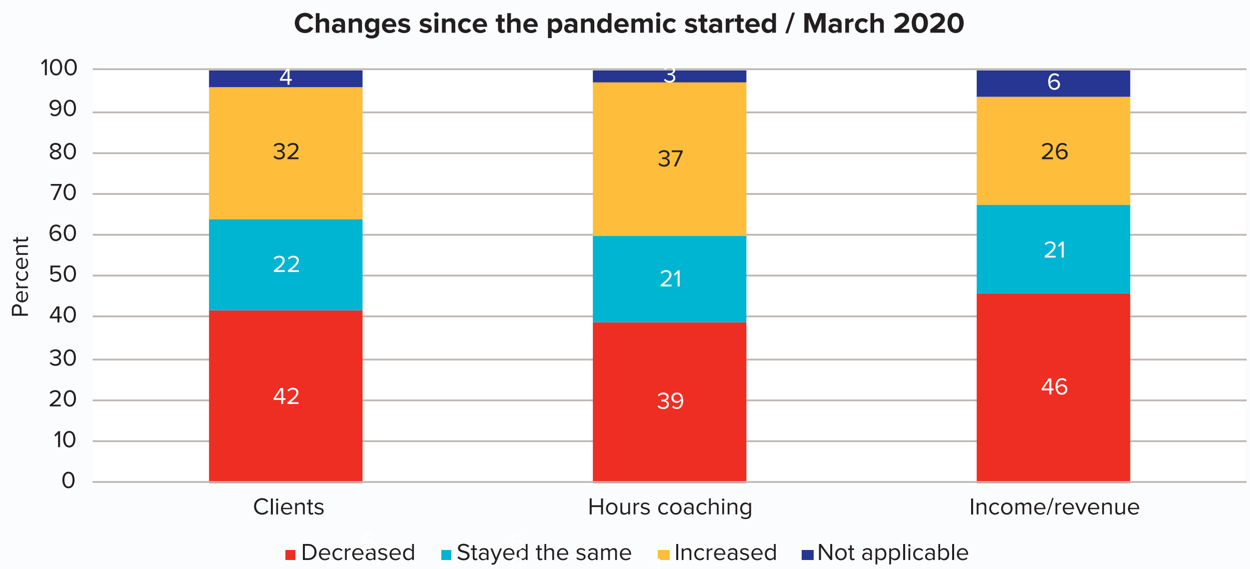


Internal coach practitioners and those who coach both internally and externally were asked about the impact of the pandemic on the use of coaching within their organization. By early 2021, 44% said the impact had been positive, including 24% citing a limited positive impact and 20% reporting a significant positive impact.



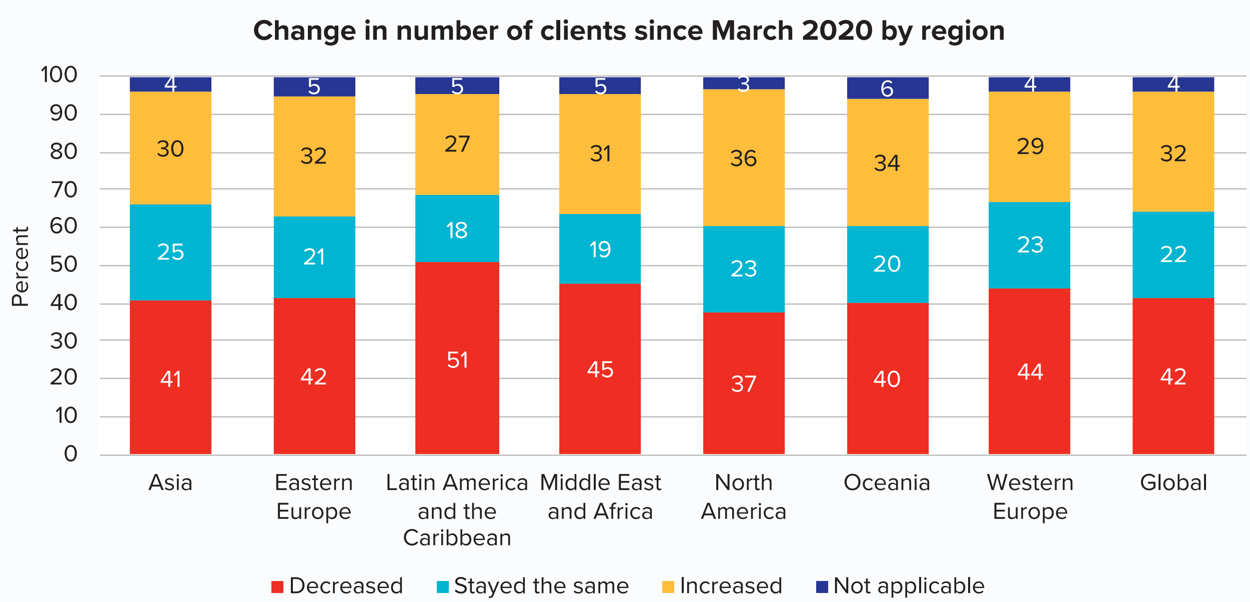
Changes since the pandemic started: Clients, hours and income/revenue

Since the beginning of the pandemic, 42% of coach practitioners have experienced a decrease in their number of active clients. A similar proportion (39%) have seen a reduction in their hours coaching while 46% of coach practitioners have suffered reduced income/revenue from coaching since the pandemic started. For some coach practitioners, the pandemic has been positive in terms of clients (32% with an increase), hours (37%) and income/revenue (26%).

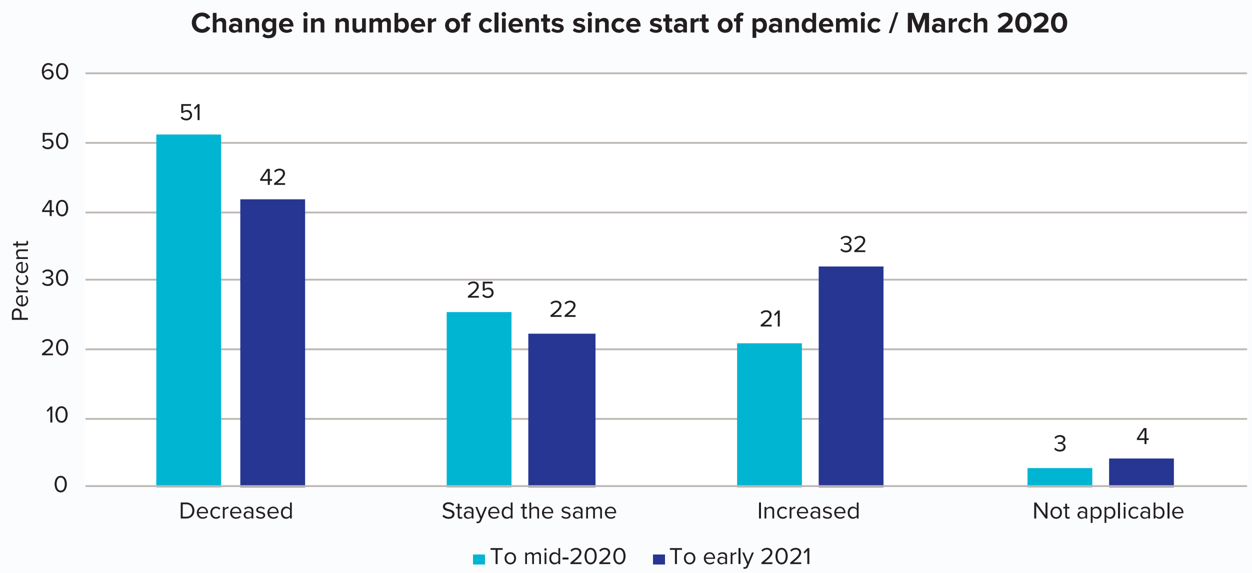


Clients

Across the seven world regions, the proportion of coach practitioners saying their number of clients decreased ranged from 51% in Latin America and the Caribbean to 37% in North America. In each region, around one in three coach practitioners said client numbers had increased, from 27% in Latin America and the Caribbean to 36% in North America.

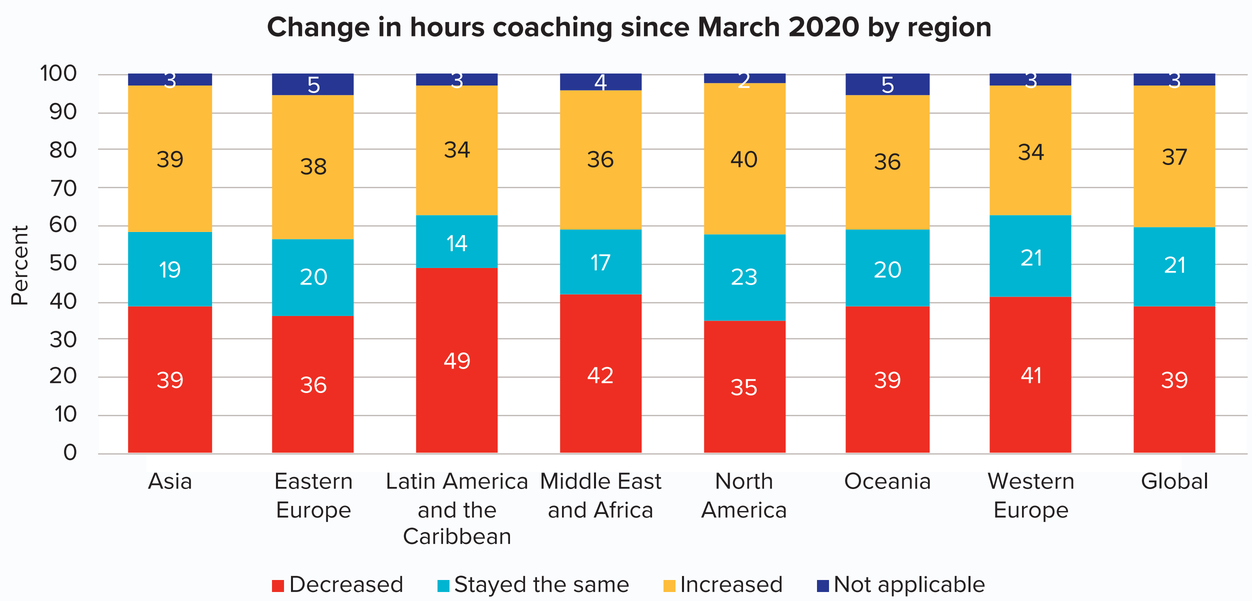


Fewer coach practitioners reported a decrease in clients over the period between the start of the pandemic and early 2021 compared to the start of the pandemic and mid-2020.

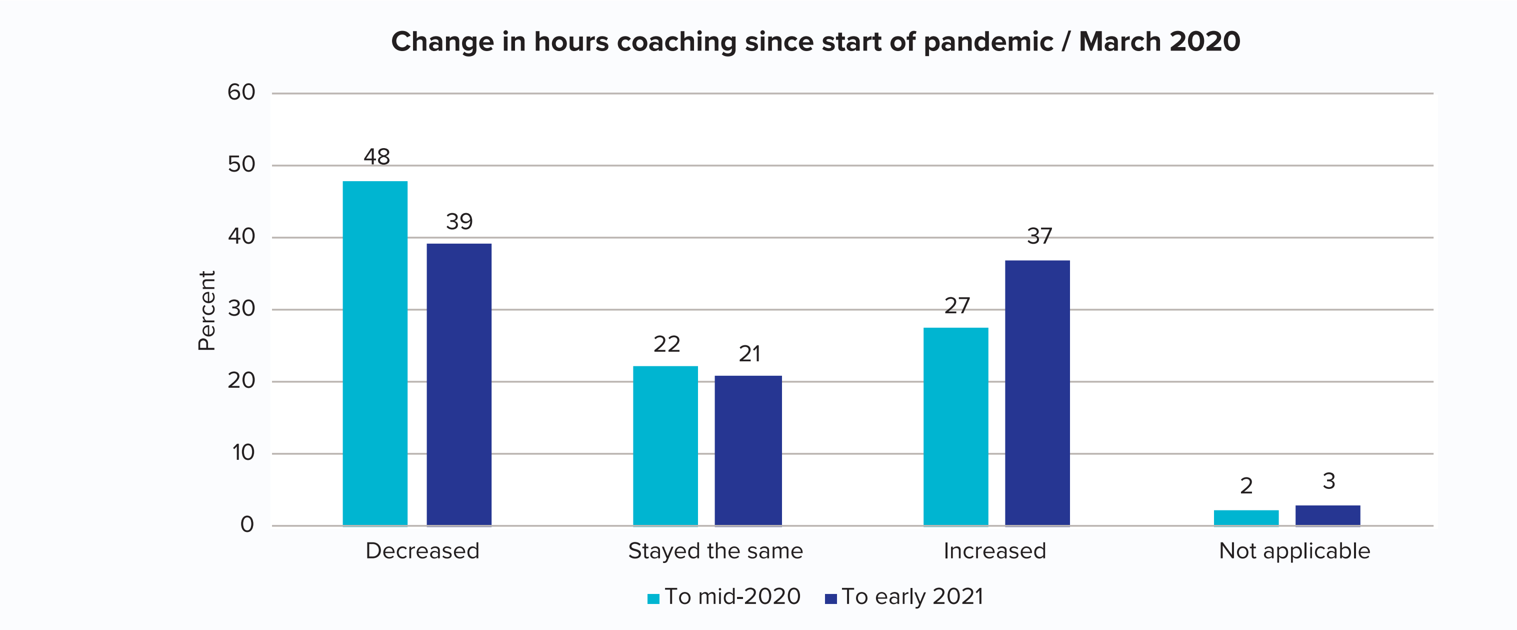


Hours Coaching

The proportion of coach practitioners saying their hours coaching had decreased since the pandemic started through to early 2021 ranged from 35% in North America to 49% in Latin America and the Caribbean.

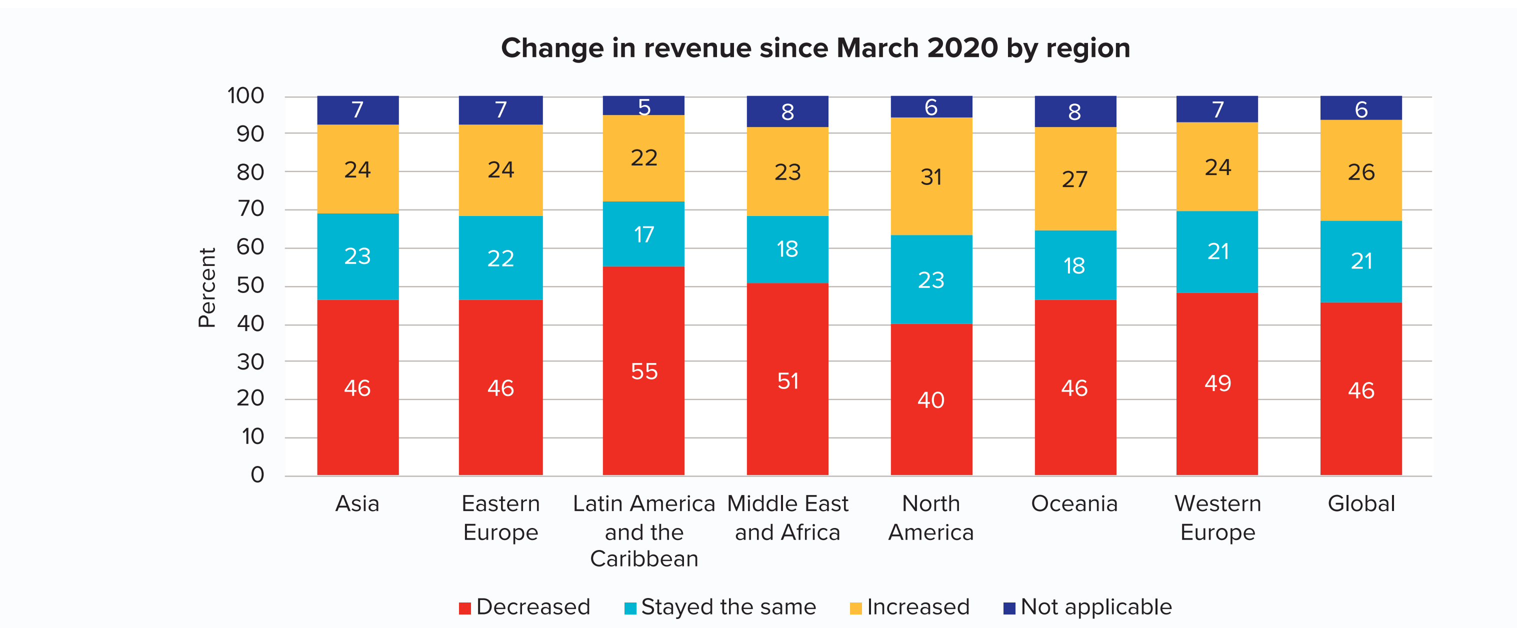


Fewer coach practitioners reported a decrease in hours coaching over the period from between the start of the pandemic and early 2021 compared with the period to mid-2020.

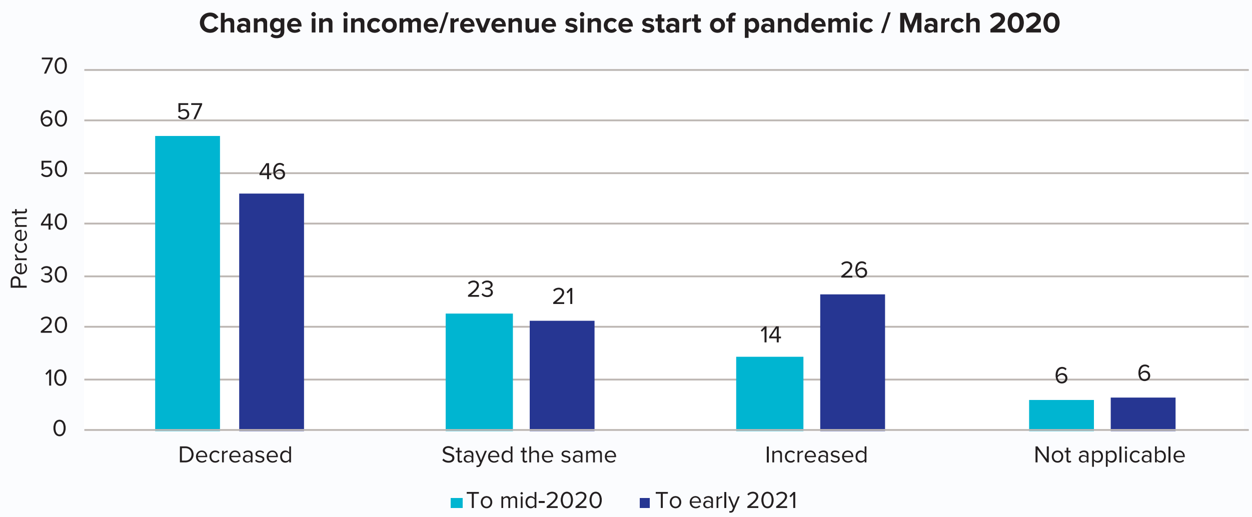


Income / Revenue

The proportion of coach practitioners who said they had experienced a decrease in income/revenue since the pandemic started through to early 2021 was lowest in North America (40%) and highest in Latin America and the Caribbean (55%).

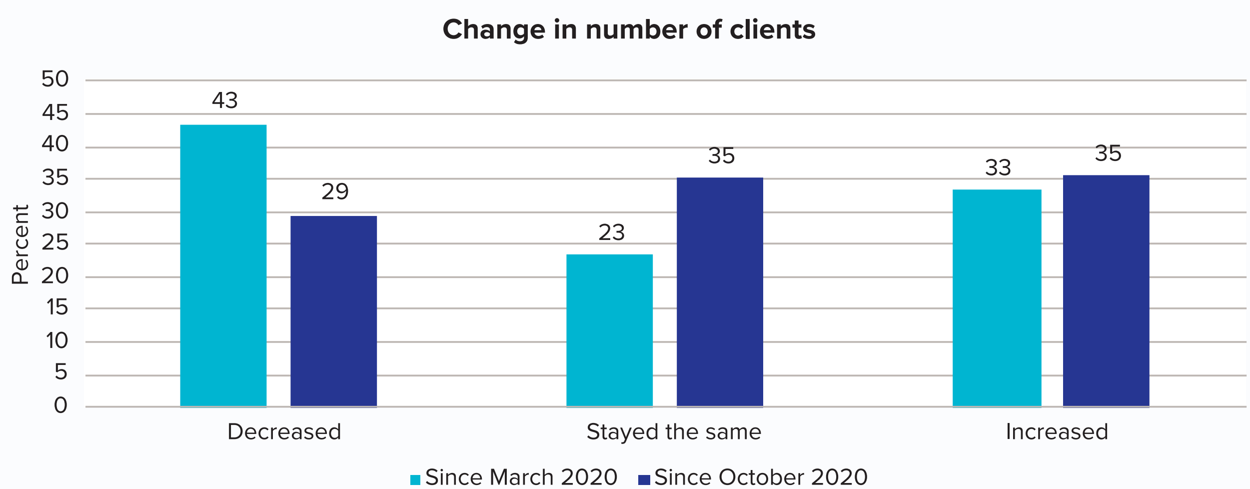


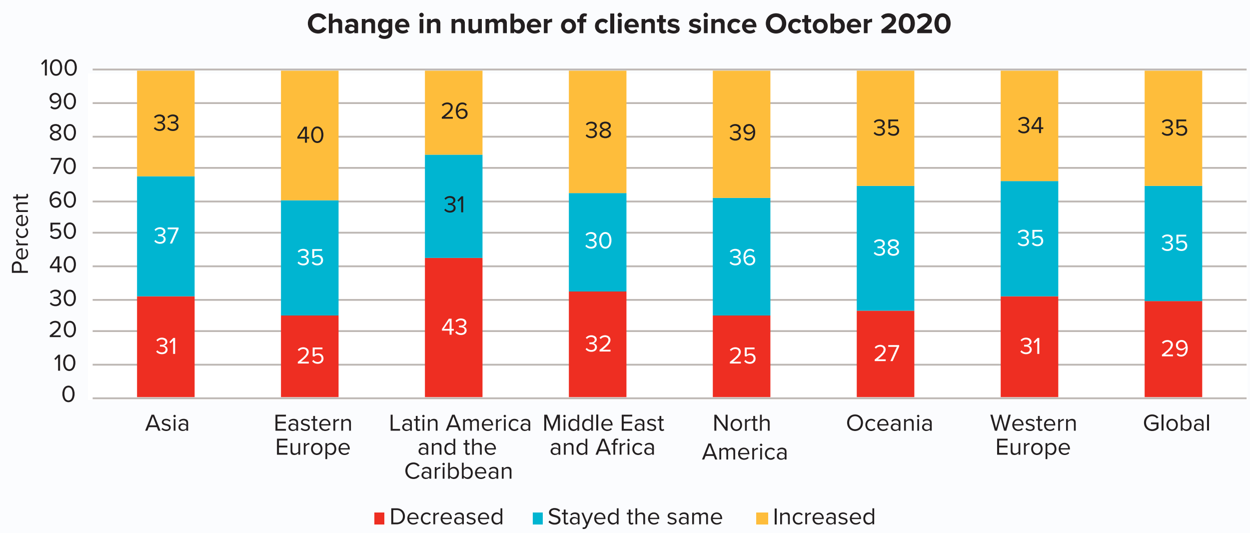
Between the start of the pandemic and mid-2020, 57% of coach practitioners said their income/revenue had fallen. By early 2021, the proportion had dropped to 46%.



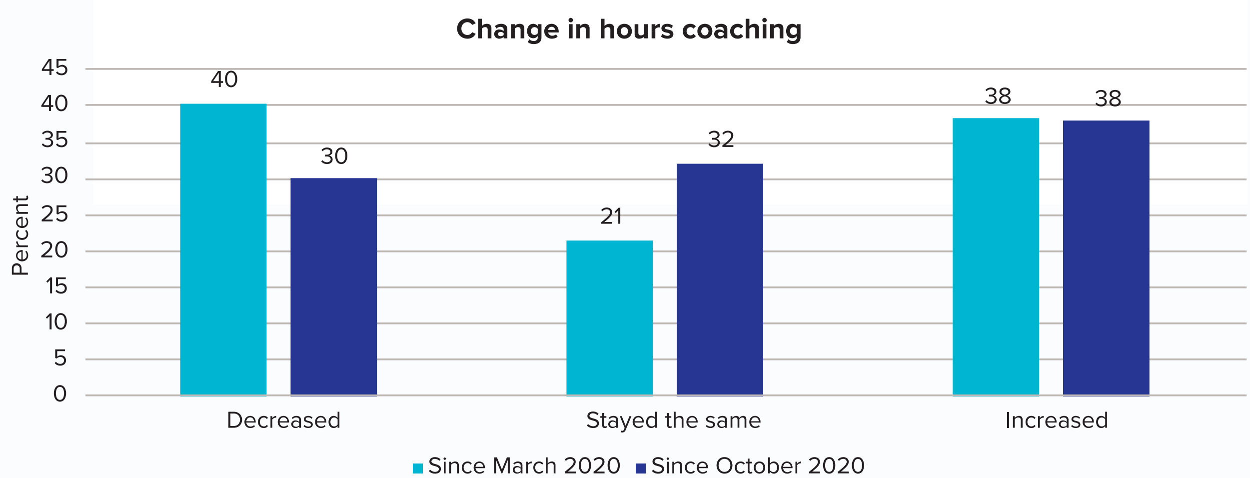
The period since end-October 2020

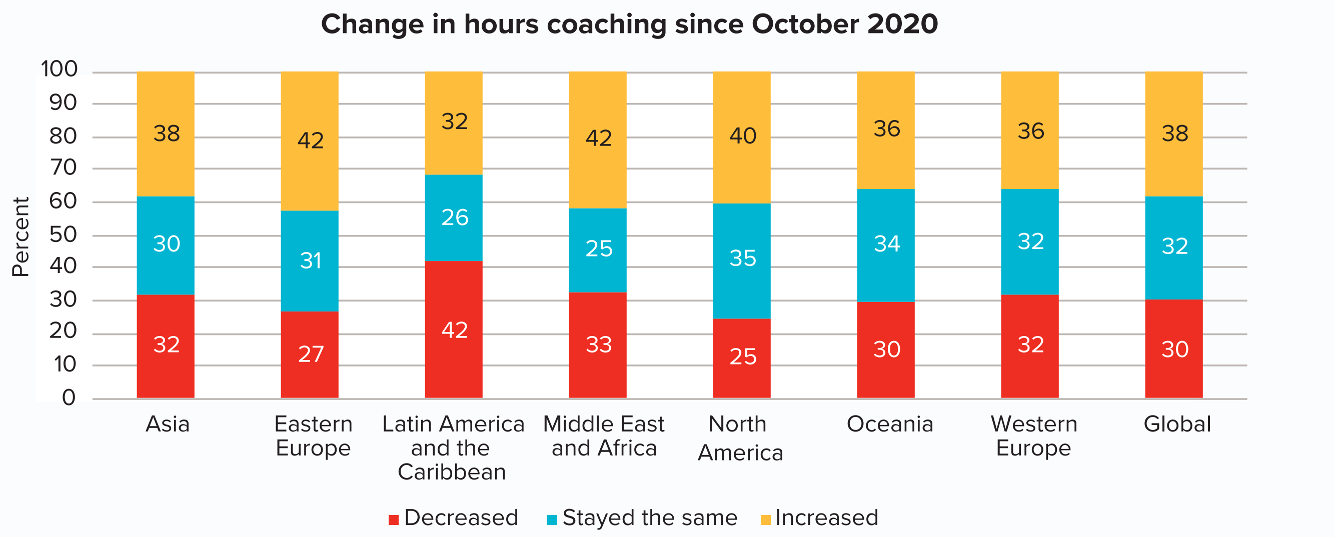
In addition to changes since the pandemic started, coach practitioners were also asked specifically about changes since the end of October 2020, to give an indication of the more recent trend. Regarding their number of clients, 29% said they had seen a decrease since end-October 2020. That is less than the 43% of coach practitioners saying their client numbers had fallen over the full course of the pandemic, since March 2020. That would suggest that, in more recent months, the position with respect to numbers of clients has been improving. Mainly, that would appear to be due to client numbers at least staying the same (35% since October 2020 versus 23% since the onset of the pandemic).



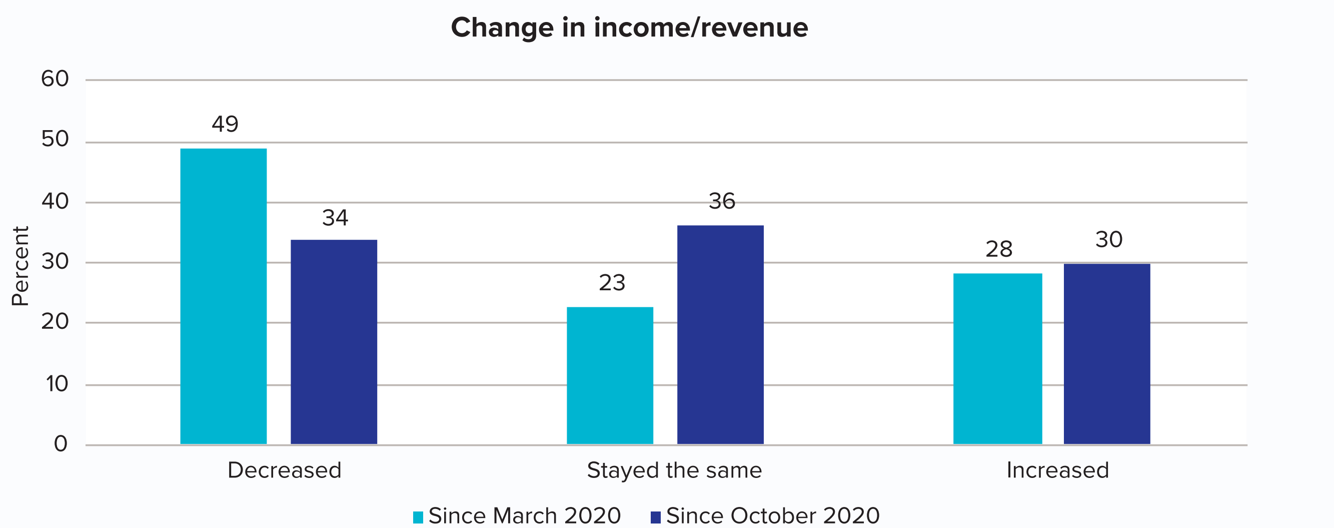


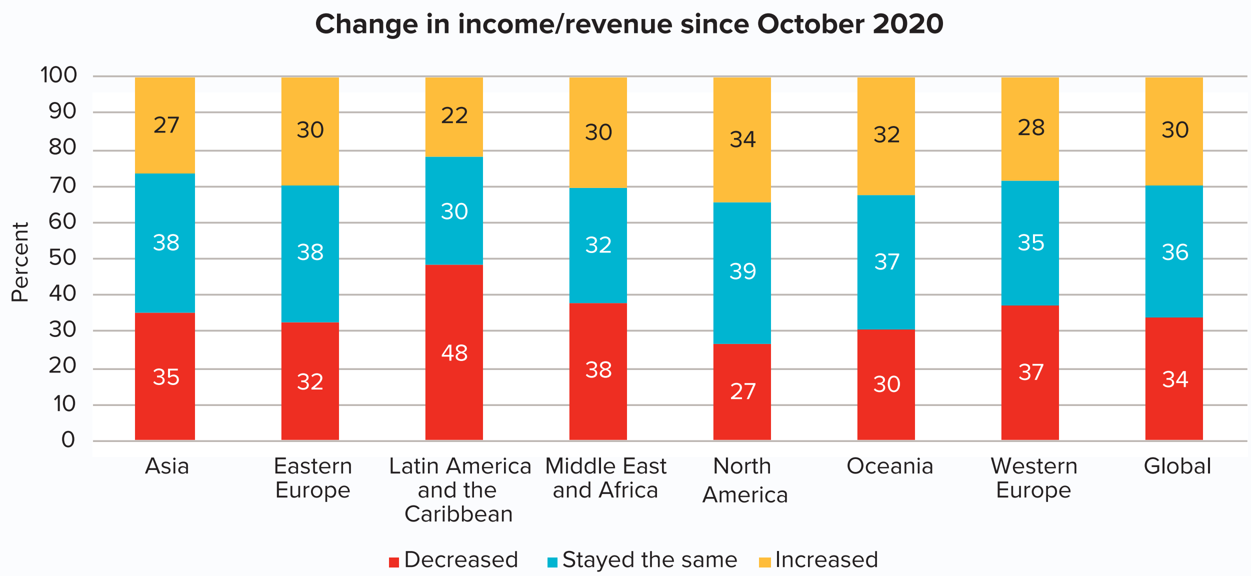
Thus, 30% of coach practitioners said they had experienced a decrease in their hours coaching since end-October 2020, which can be compared with the 40% of coach practitioners saying their hours had fallen over the course of the pandemic. Again, the improving situation would appear to be due to hours coaching remaining the same since October 2020, at 31% compared with 21% since the beginning of the pandemic in March 2020.





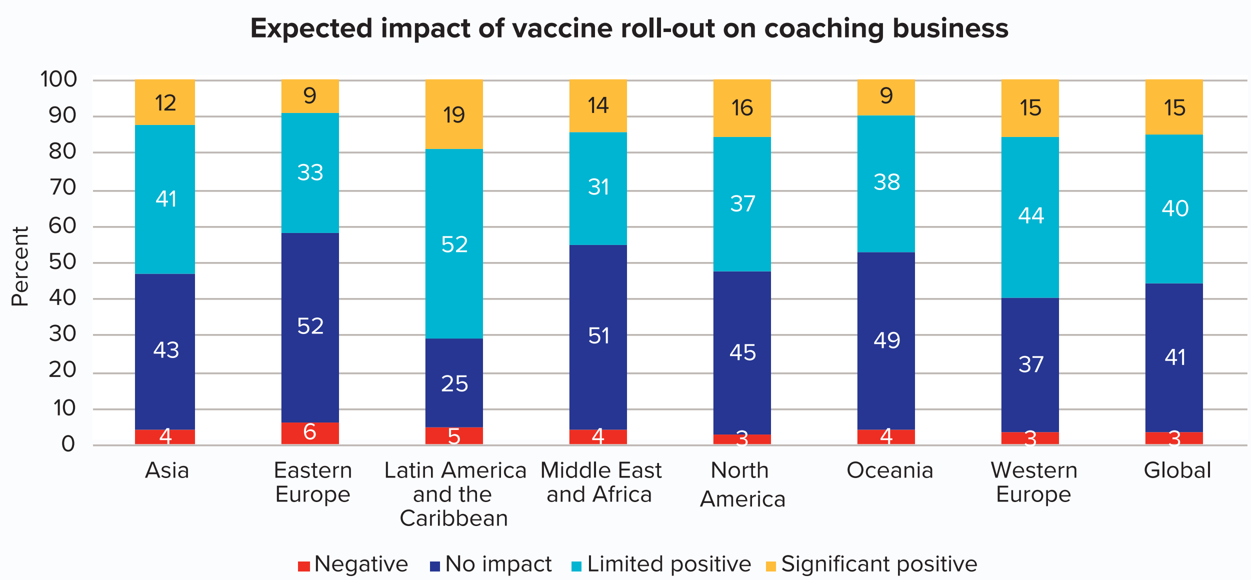
Clients and hours coaching are the main drivers of income/revenue from coaching. It is therefore entirely to be expected that the trend in income/revenue from coaching since end-October 2020 is very aligned with the trends in client numbers and hours coaching.





Vaccine Roll-out

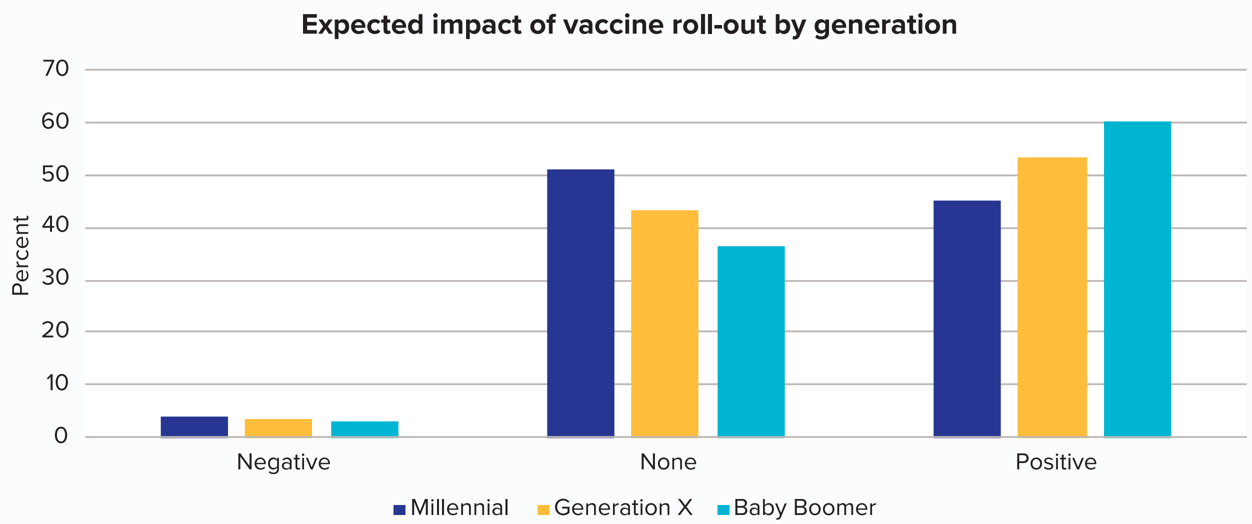
The majority of coach practitioners expect that the roll-out of approved vaccines will have a positive impact on their coaching business. Though, with vaccine roll-out just beginning in early 2021, coach practitioners' expectations were relatively restrained, with 40% expecting a 'limited' positive impact and just 15% expecting a 'significant' positive impact.



Expectations for vaccine roll-out to have a positive impact vary by generation, from 45% of Millennials to 60% of Baby Boomers.

Expectations also vary according to main area of coaching specialty and the position held by the majority of the coach's clients:

- 60% of coach practitioners with a Business Coaching specialty expect that vaccine roll-out will have a positive impact on their business compared with 51% of those with a non-business specialty.
- The proportion anticipating a positive impact ranged from 64% of coach practitioners who mainly coach Executive clients to 57% who mainly coach business owners, entrepreneurs and team leaders to 49% of those who mainly coach individual and personal clients.



SECTION 3

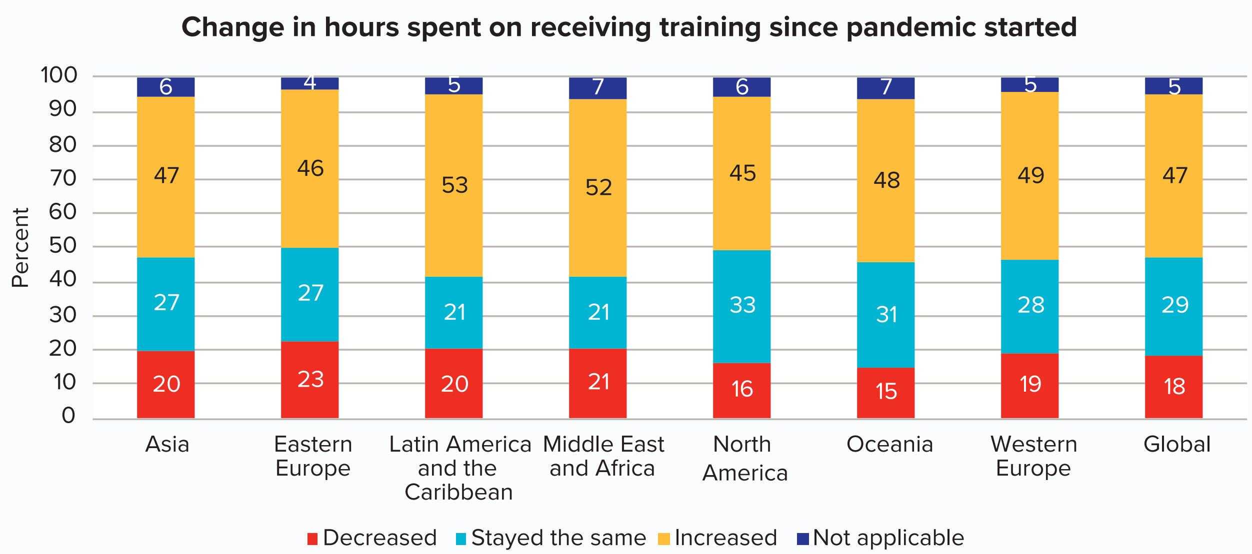
Introduction

This section examines how coach practitioners have responded to the pandemic, under the following headings:

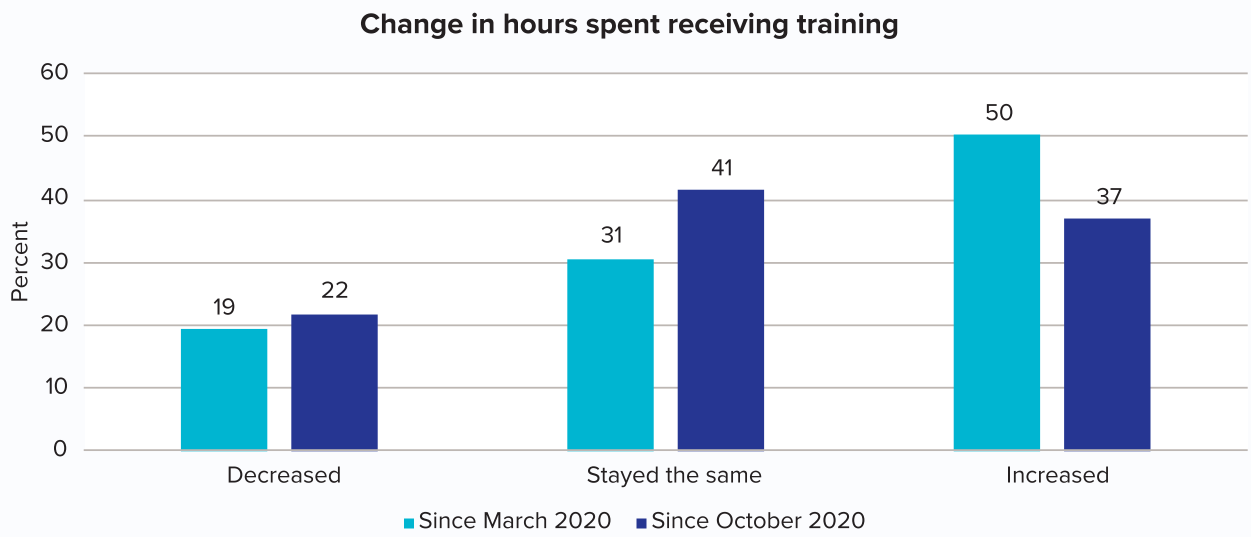
- Receipt of training
- Service offering
- Methods used to coach clients
- Coaching virtually

Training

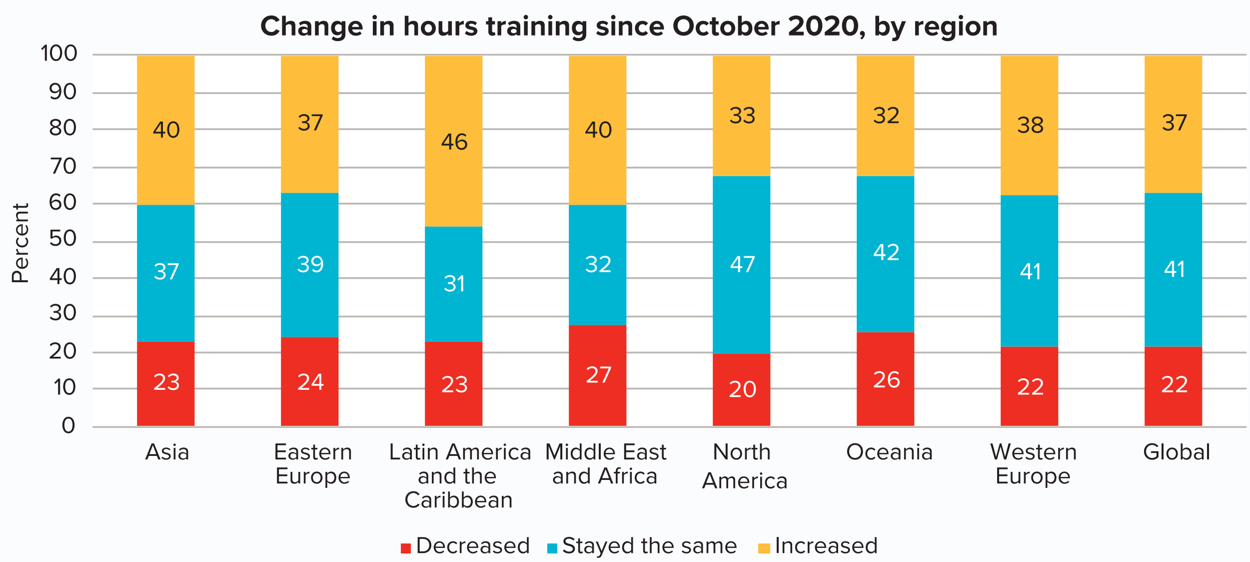
A little under one in two coach practitioners (47%) said they had increased their hours spent on receiving training since the pandemic started. The proportion varied from 45% in North America to 53% in Latin America and the Caribbean.



For the period since end-October 2020, 37% of coach practitioners said they had increased their hours spent training. That is lower than the proportion saying they had increased training hours over the course of the pandemic, since March 2020. The difference may have arisen because, as discussed in Section 2, the early 2021 survey shows some recovery in business indicators such as hours spent coaching. Alternatively, in the early months of the pandemic, with sharply reduced activity in relation to hours coaching, coach practitioners were able to devote more time to receipt of training which was then scaled back where demand for coaching services began to recover.



Change in hours spent receiving training
Percent
60
50
40
30
20
10
0
19
22
31
41
50
37
Decreased
Stayed the same
Increased
Since March 2020
Since October 2020



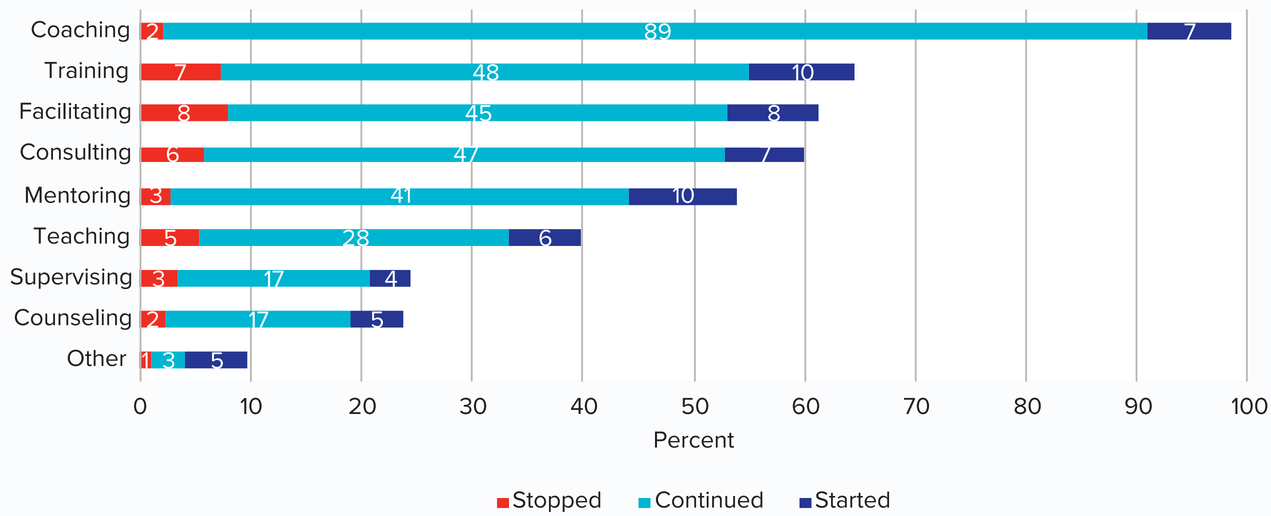
Change in hours training since October 2020, by region
Percent
100
90
80
70
60
50
40
30
20
10
0
40
37
46
40
33
32
38
37
37
39
31
32
47
42
41
41
23
24
23
27
20
26
22
22
Asia
Eastern Europe
Latin America and the Caribbean
Middle East and Africa
North America
Oceania
Western Europe
Global
Decreased
Stayed the same
Increased

Services

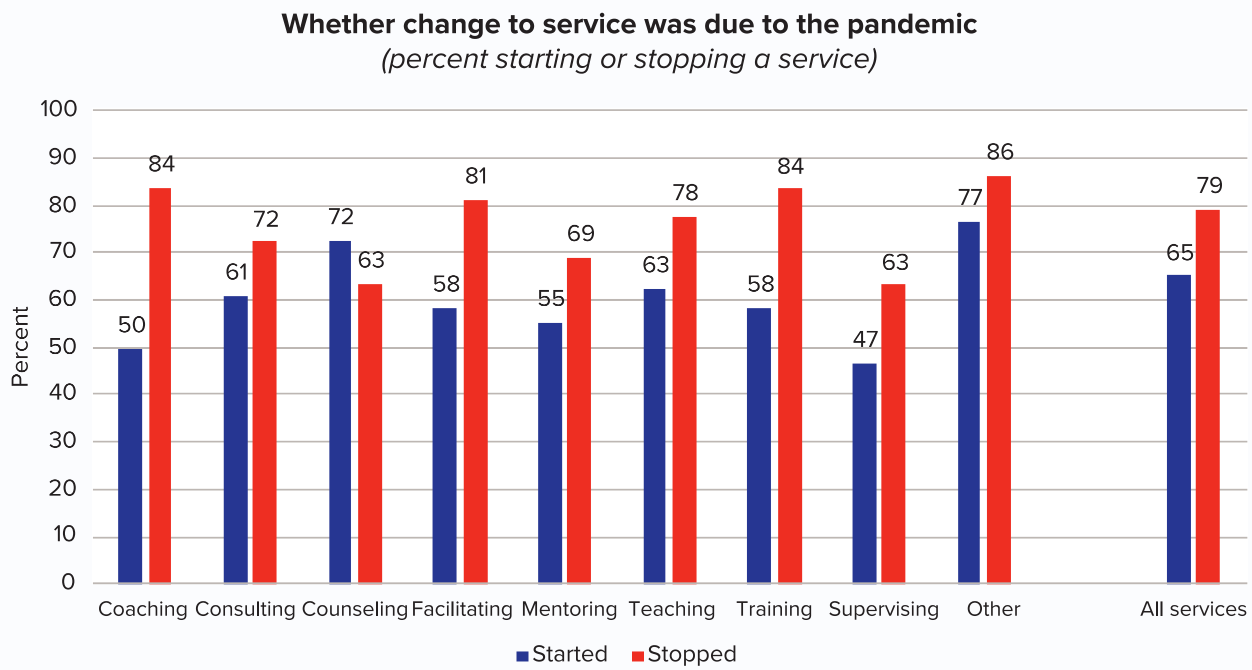
Almost all coach practitioners offer services, such as training and consulting, in addition to coaching; 94% according to the *2020 ICF Global Coaching Study*. Within that context, it was considered important to examine the extent to which coach practitioners have responded to the pandemic by changing the mix of services that they offer.

The change in the mix of services was assessed by first asking coach practitioners which services they had started offering, continued to offer or stopped offering, since the beginning of the pandemic. The results by individual service are shown in the chart below. For example, 48% of respondents said they had continued offering training services, 7% said they had stopped offering that service and 10% said they had added training to the services that they offer.

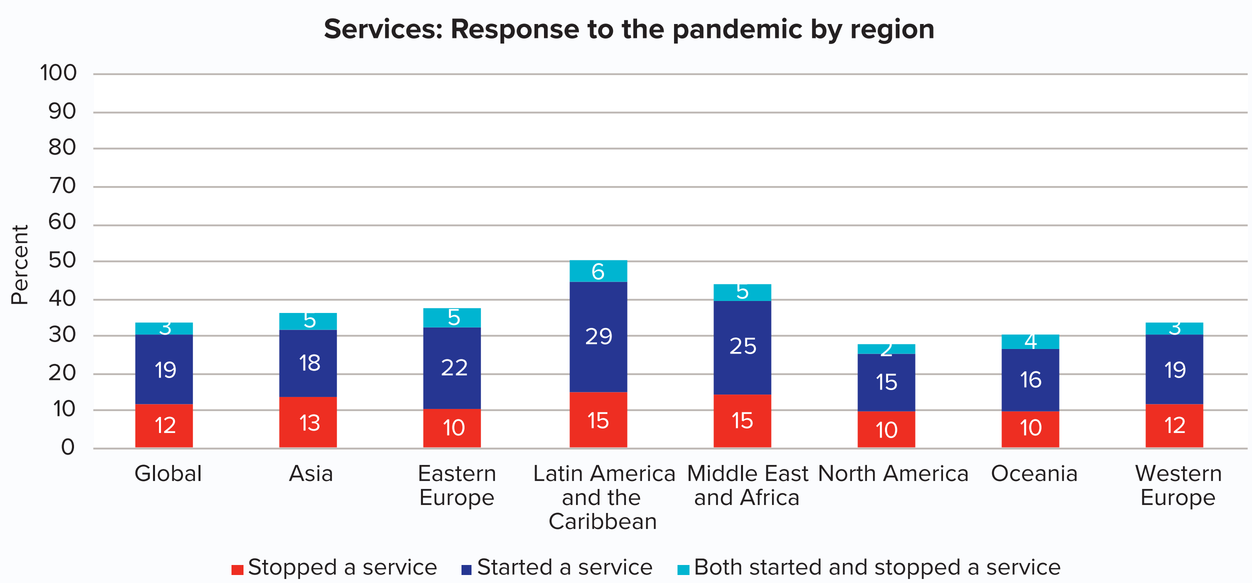
Services started to offer/continued to offer/stopped offering since the pandemic began



Coach practitioners who said they had started and/or stopped a service were asked if the changes they had made were in response to the pandemic. On average, 65% of services started were in response to the pandemic while 79% of services stopped were in response to the pandemic. **Overall, of the service changes made by coach practitioners, 72% were attributed to the pandemic.**

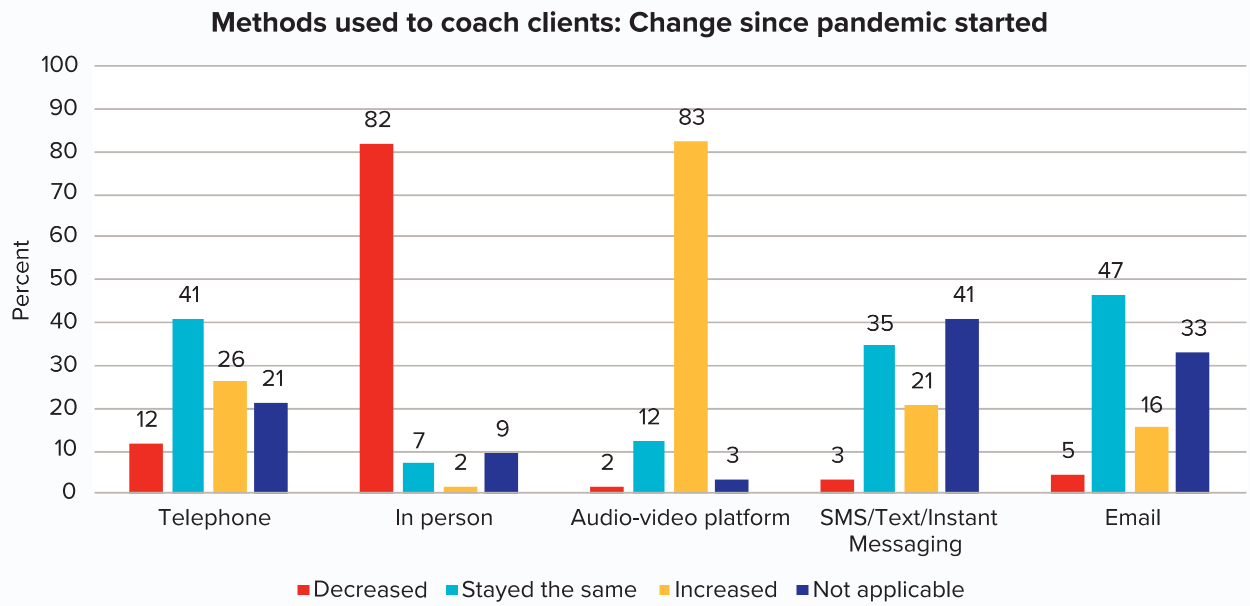


Overall, **34% of coach practitioners made one or more changes to their service offering specifically in response to the pandemic,** ranging from 50% of coach practitioners in Latin America and the Caribbean to 27% in North America.

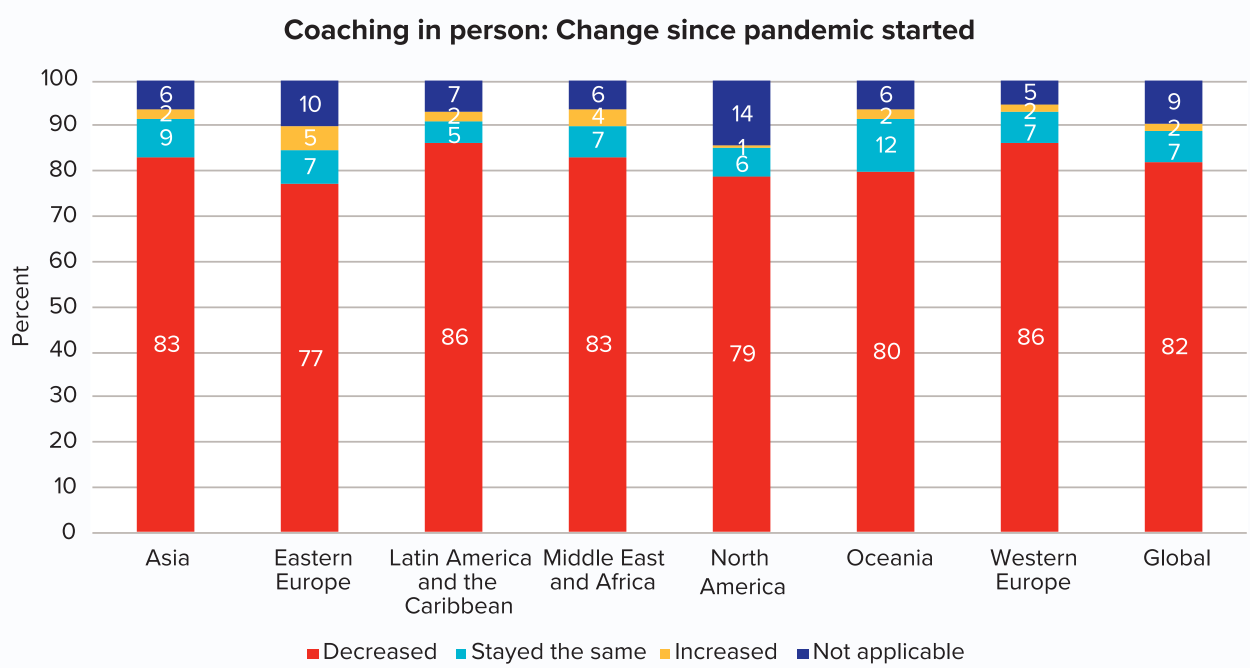


Methods used to coach clients

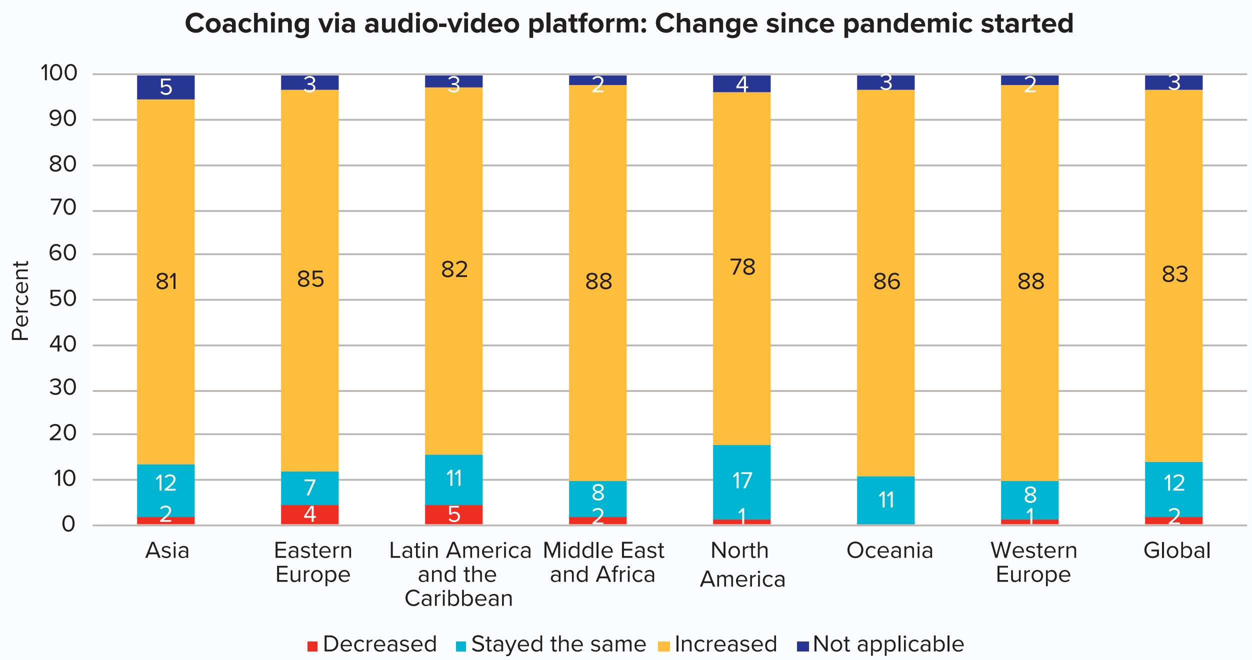
Since the pandemic, coach practitioners have adjusted their methods used to coach clients. Reflecting the need for social distancing in managing the risks from the pandemic, there has been a sharp decrease in coaching in person (82%). Instead, coaches have increased their use of audio-video platforms (83%).



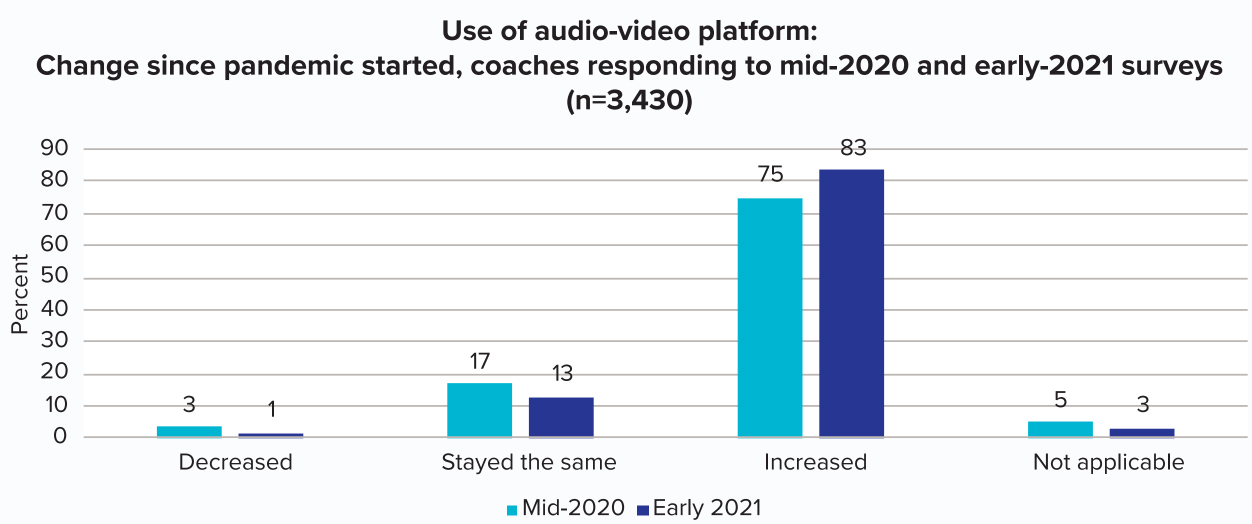
Coaching in person has fallen substantially across all regions, from 79% in North America to 86% in Western Europe and Latin America and the Caribbean.



Similarly, all regions have seen large increases in the use of an audio-video platform to coach clients, from 78% in North America to 88% in Western Europe.

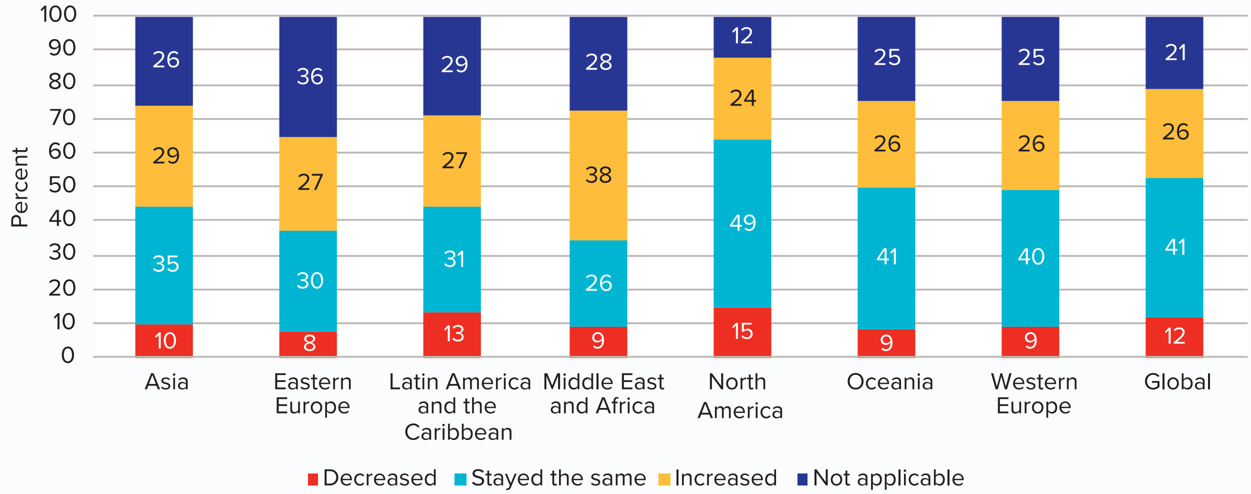


The use of an audio-visual platform would appear to have expanded over the course of the pandemic. In the COVID-19 study conducted in early 2021, over 3,400 responses were received from coach practitioners who had also participated in the mid-2020 COVID-19 survey. Comparing that cohort's responses to both surveys, the proportion reporting an increase in their use of an audio-video platform rose from 75% in mid-2020 to 83% by early 2021.



Coaching by telephone has also increased during the pandemic, though not nearly to the same degree as audio-video platforms. The proportion increasing their use of the telephone varied from 38% in the Middle East and Africa to 24% in North America. Though, it should be noted that the pre-pandemic use of the telephone for coaching differed considerably between regions, with the 'not applicable' proportion ranging from 36% in Eastern Europe to 12% in North America.

Coaching by telephone: Change since pandemic started

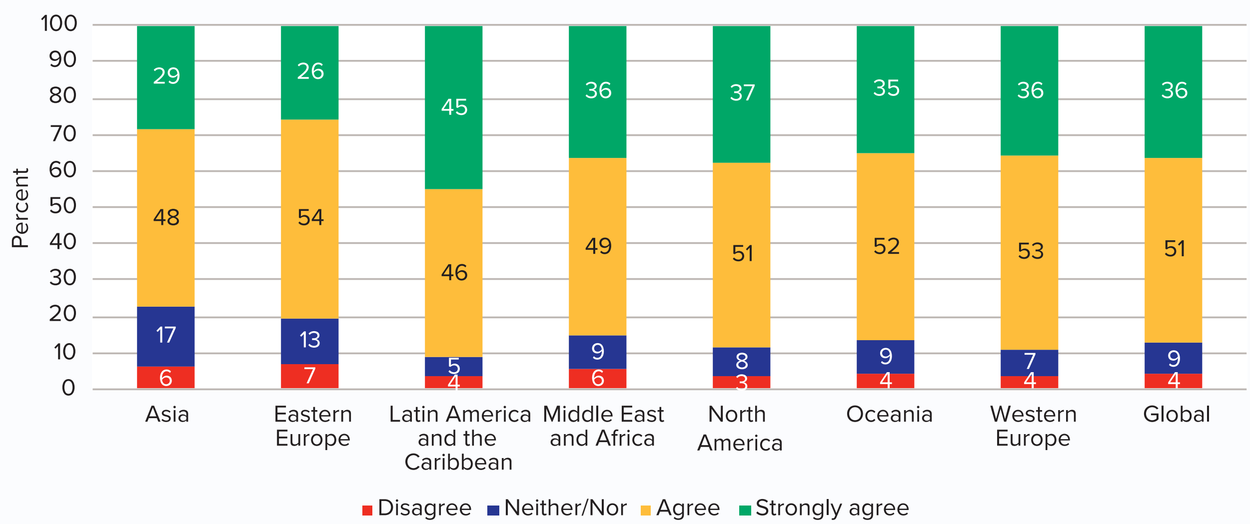


Coaching Virtually

As measured by their use of an audio-video platform, coach practitioners were already shifting to coaching virtually prior to the pandemic. According to the *2020 ICF Global Coaching Study*, between 2015 and 2019, the proportion of coach practitioners saying they 'frequently' or 'always' use an audio-video platform doubled, from 24% to 48%. With the increased use of audio-video platforms, the pandemic has given an added impetus to coaching virtually.

Against that backdrop, almost nine in 10 coach practitioners (87%) agree that coaching virtually will continue at a higher rate long term, beyond the pandemic, ranging from 77% in Asia to 91% in Latin America and the Caribbean.

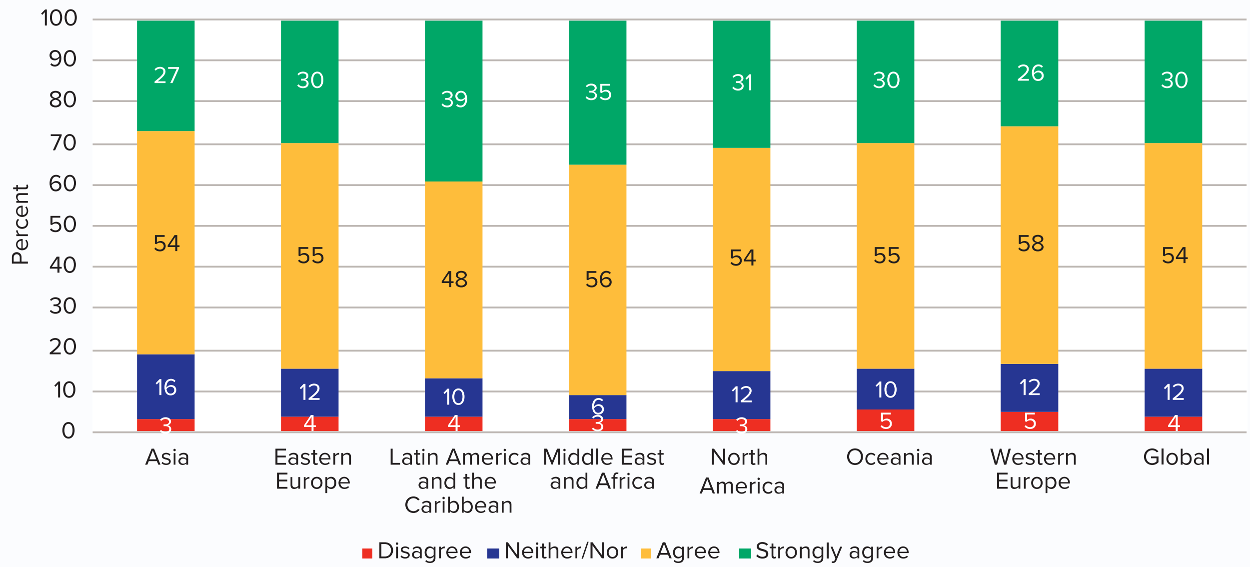
"Coaching virtually will continue at a higher rate long term"



The expectation that coaching virtually will continue at a higher rate long-term was widely held and did not vary with attributes of the coach practitioner, including generation, gender, coaching experience or type of coach.

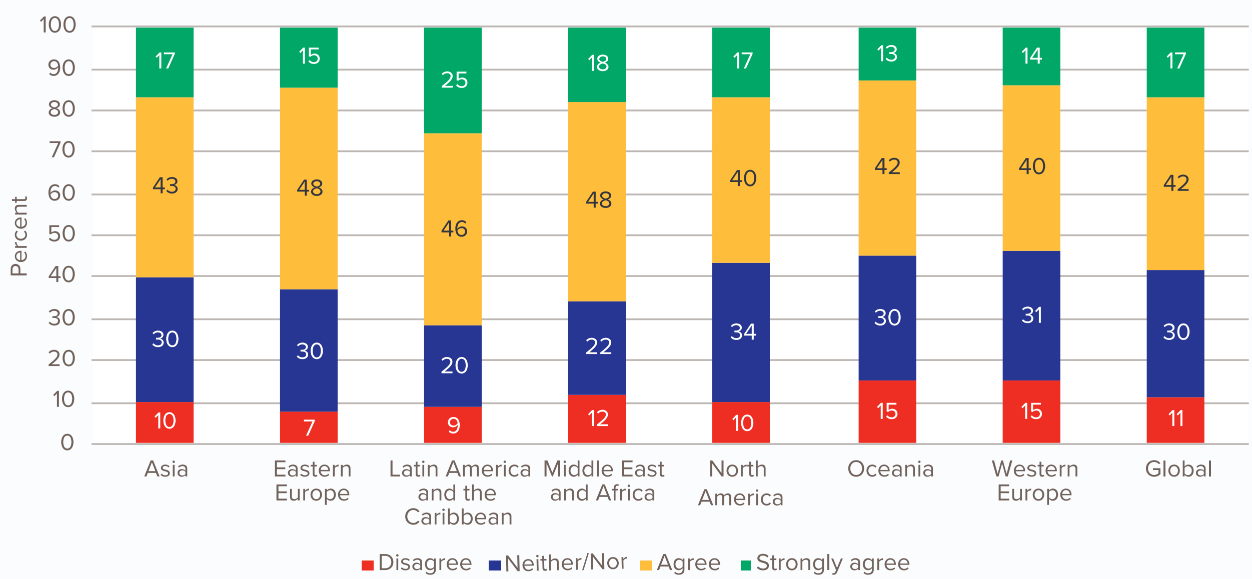
Coach practitioners also expect that, in the future, coaching virtually will enhance their business prospects. Thus, a large majority of coaches (84%) agreed that coaching virtually will create a wider audience of potential clients for their business. That belief was most widely held in the Middle East and Africa (91%).

"Coaching virtually will create a wider audience of potential coaching clients for my business"



The majority of coach practitioners (59%) also agreed that coaching virtually will result in higher profits for their business, varying from 54% in Western Europe to 71% in Latin America and the Caribbean. In general, coach practitioners in the more established regions of North America, Western Europe and Oceania were less likely than coach practitioners in other regions to believe that coaching virtually will deliver higher profits.

"Coaching virtually will result in higher profits for my business"



SECTION 4 LOOKING AHEAD

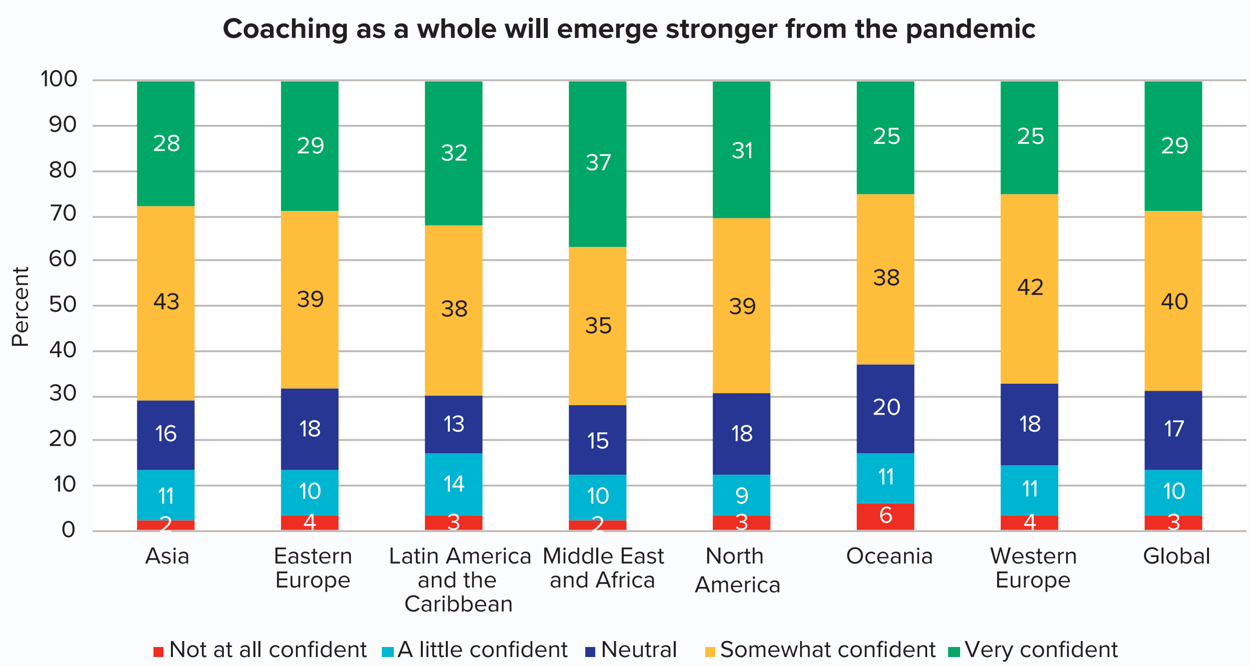
Introduction

This section presents coach practitioners' views on the next six to 12 months, in relation to the following issues:

- Confidence regarding prospects for their own practice and for coaching as a whole
- Potential shifts in the market for coaching
- The biggest obstacle for coaching over the next 12 months
- The future of coaching

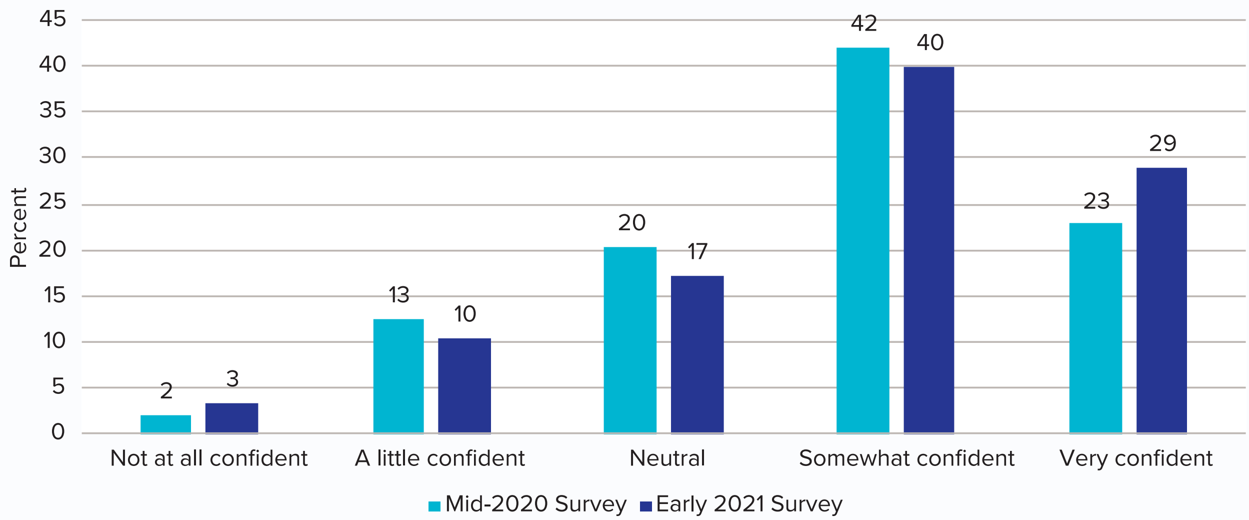
Next six months: Confidence

Coach practitioners remain cautiously optimistic that coaching will emerge stronger from the pandemic over the next six months, with 40% saying they are 'somewhat confident' and 29% 'very confident'.

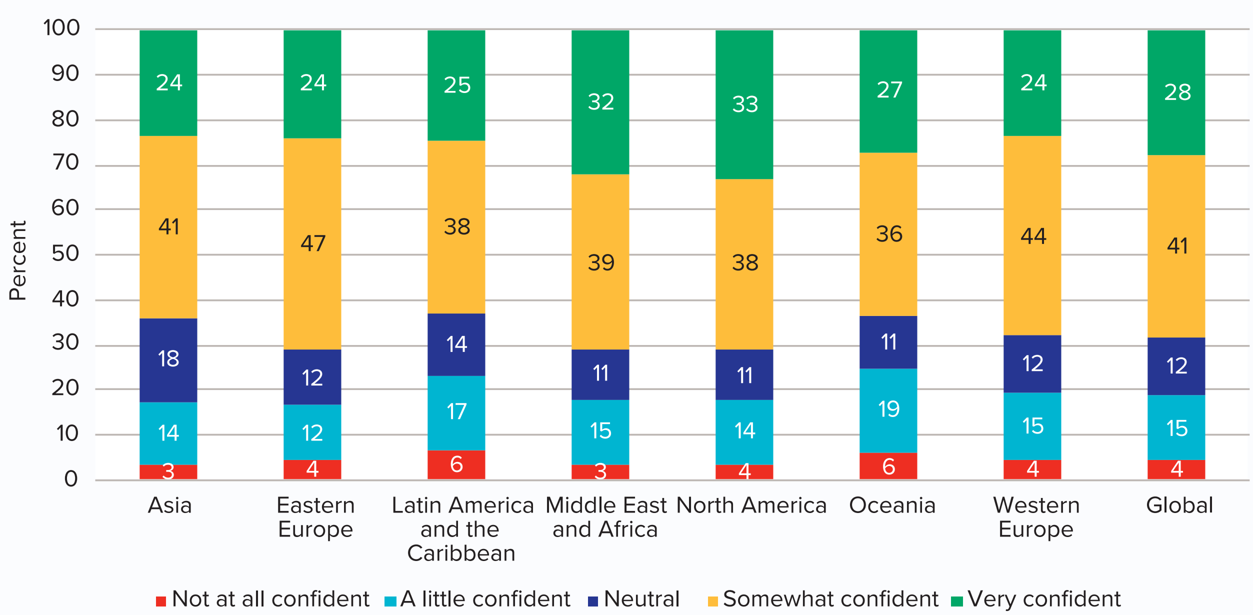


The overall confidence level is slightly higher than mid-2020, when the first COVID-19 survey was conducted. Then, 42% were 'somewhat confident' and 23% were 'very confident'.

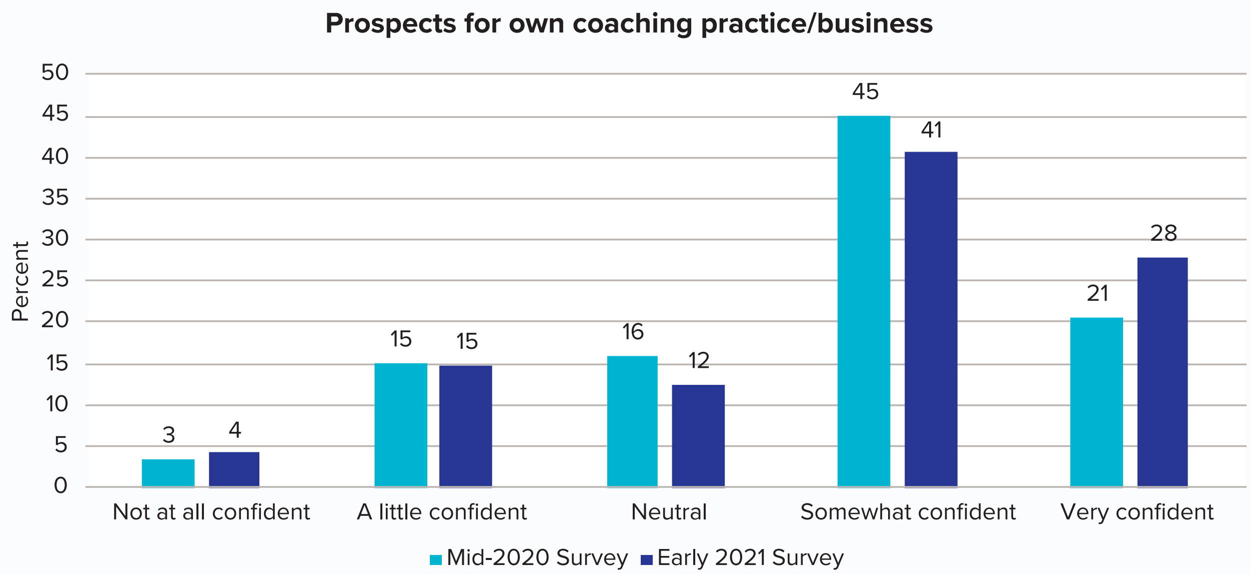
Coaching as a whole will emerge stronger from the pandemic



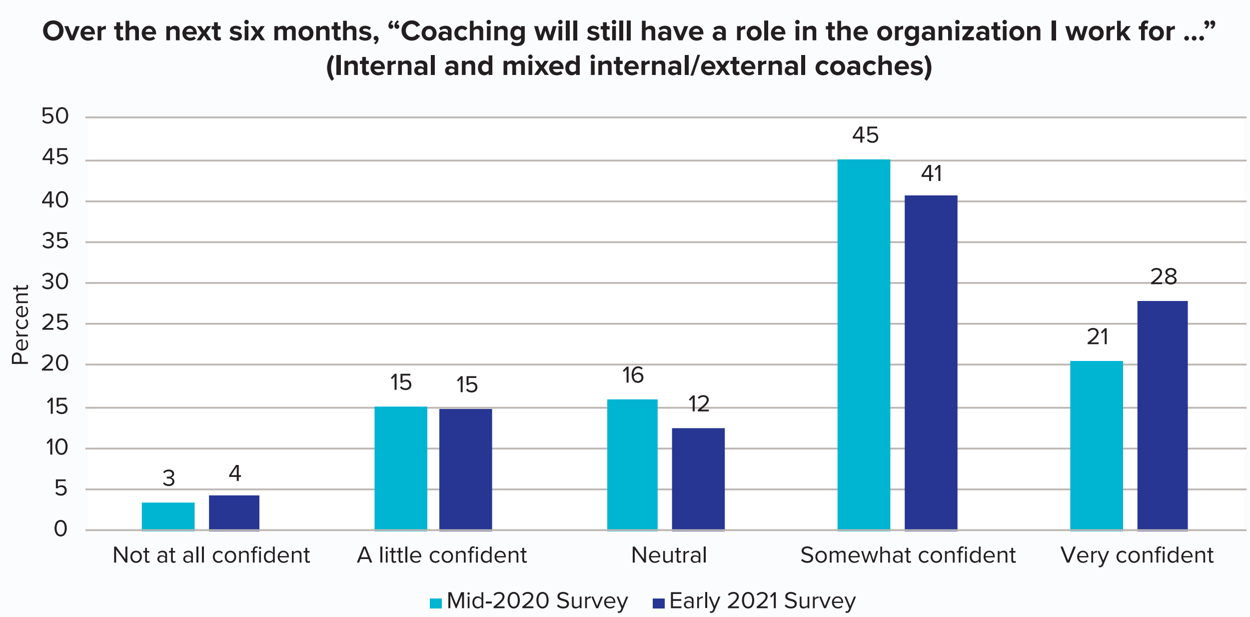
Coach practitioners are also broadly optimistic about the prospects for their own coaching practice/business over the next six months, with 41% saying they are 'somewhat confident' and 28% 'very confident'.



Again, confidence has improved, with the proportion saying they are ‘very confident’ having increased from 21% in mid-2020 to 28% by early 2021.

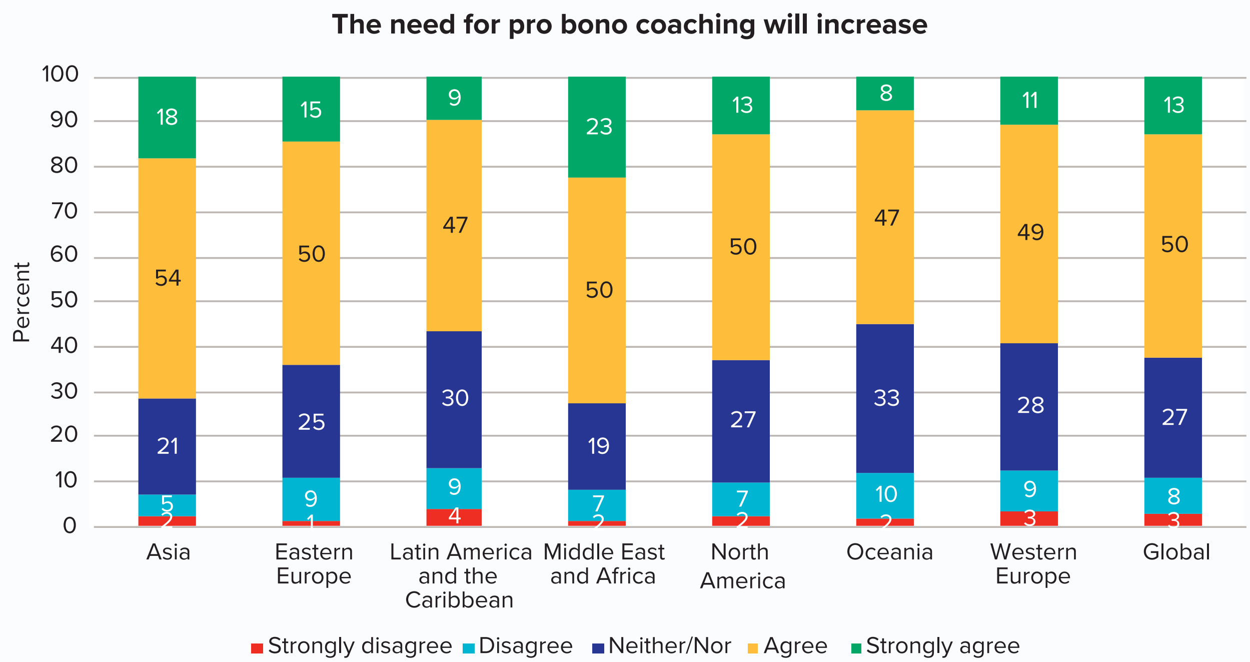


Internal and mixed internal/external coach practitioners were also asked about the outlook for the role of coaching within their own organization. A little over one in two (51%) said they are ‘very confident’, up from 46% in mid-2020.



Next six months: Market trends

Across all world regions, the majority of coach practitioners anticipate that, over the next six months, there will be an increase in the need for pro bono coaching.

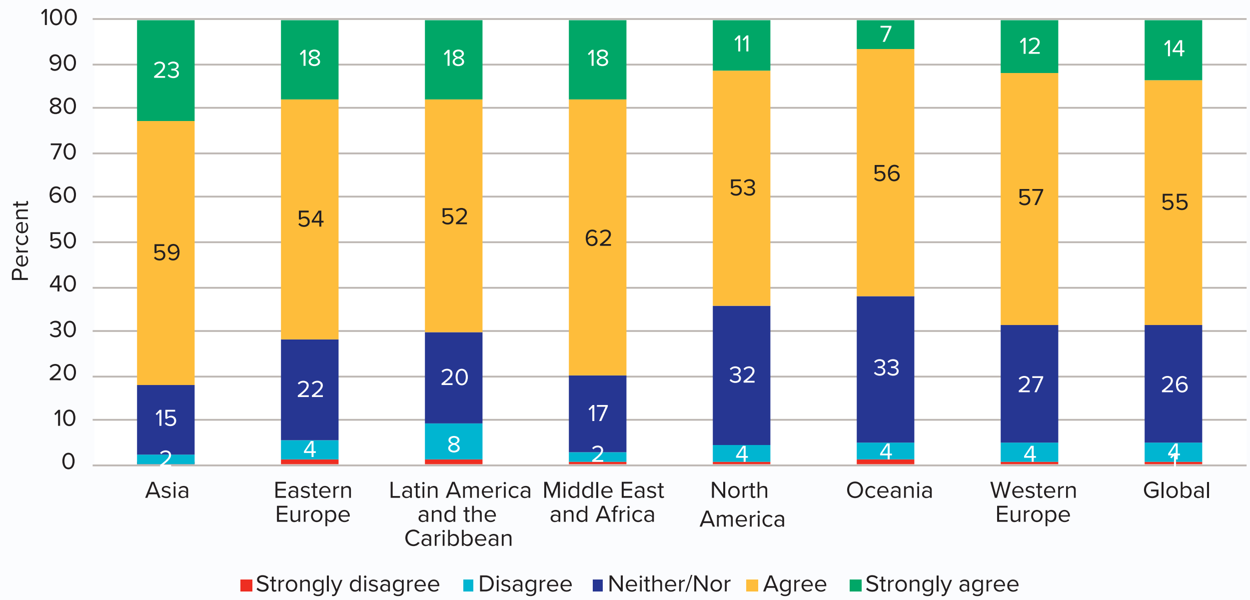


The extent of agreement that the need for pro bono coaching will increase varied somewhat with coach practitioners' position in the market:

- The less experienced coach practitioners were more likely to agree/strongly agree that the need for pro bono will increase.
- Over two in three (69%) coach practitioners with less than one years' experience agreed/strongly agreed that the need would increase compared with 59% of coach practitioners with 10+ years' experience.
- Coach practitioners with a non-business specialty were also more likely to say they agreed/strongly agreed that the need for pro bono would increase — 74% compared with 62% of coach practitioners with a Business Coaching specialty.

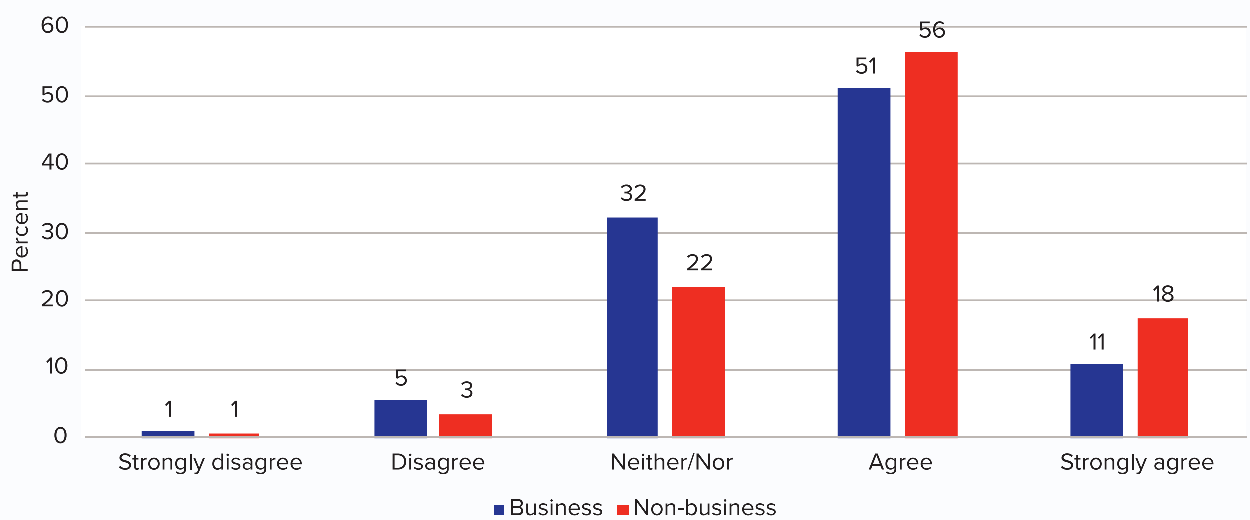
A majority of coach practitioners anticipate that life vision and enhancement coaching will become more prevalent over the next six months, with 55% agreeing and a further 14% strongly agreeing.

Life Vision and Enhancement coaching will become more prevalent

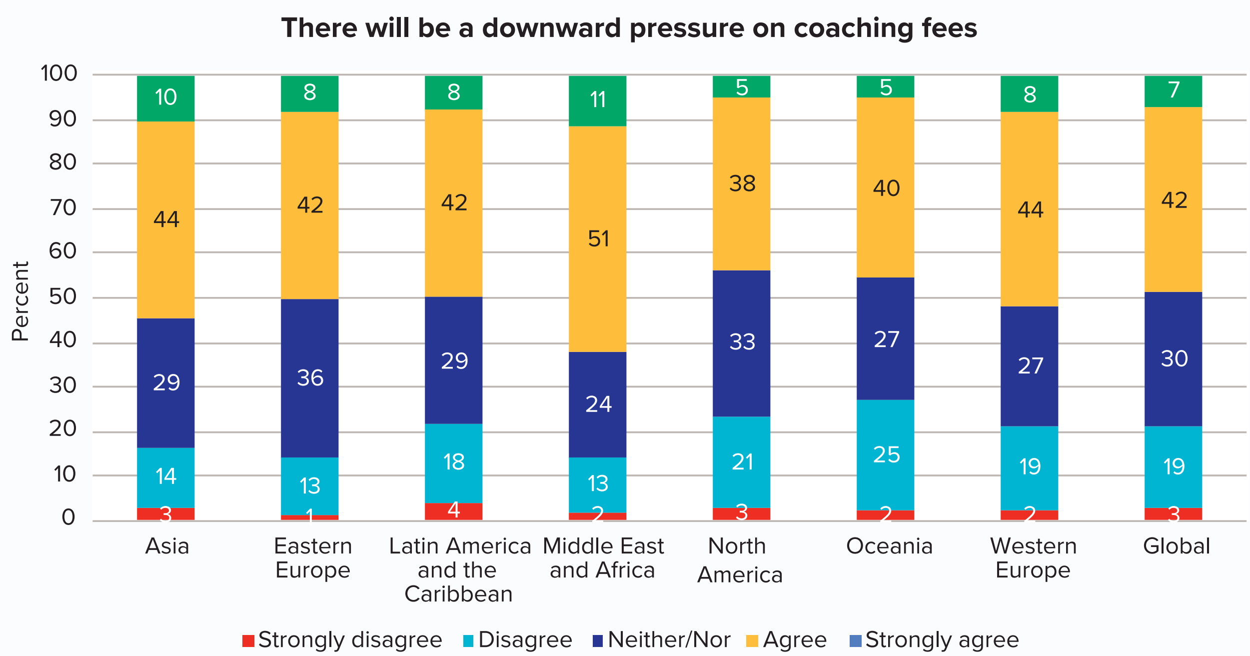


Regardless of main specialty, most coach practitioners were in broad agreement that Life Vision and Enhancement Coaching will become more prevalent.

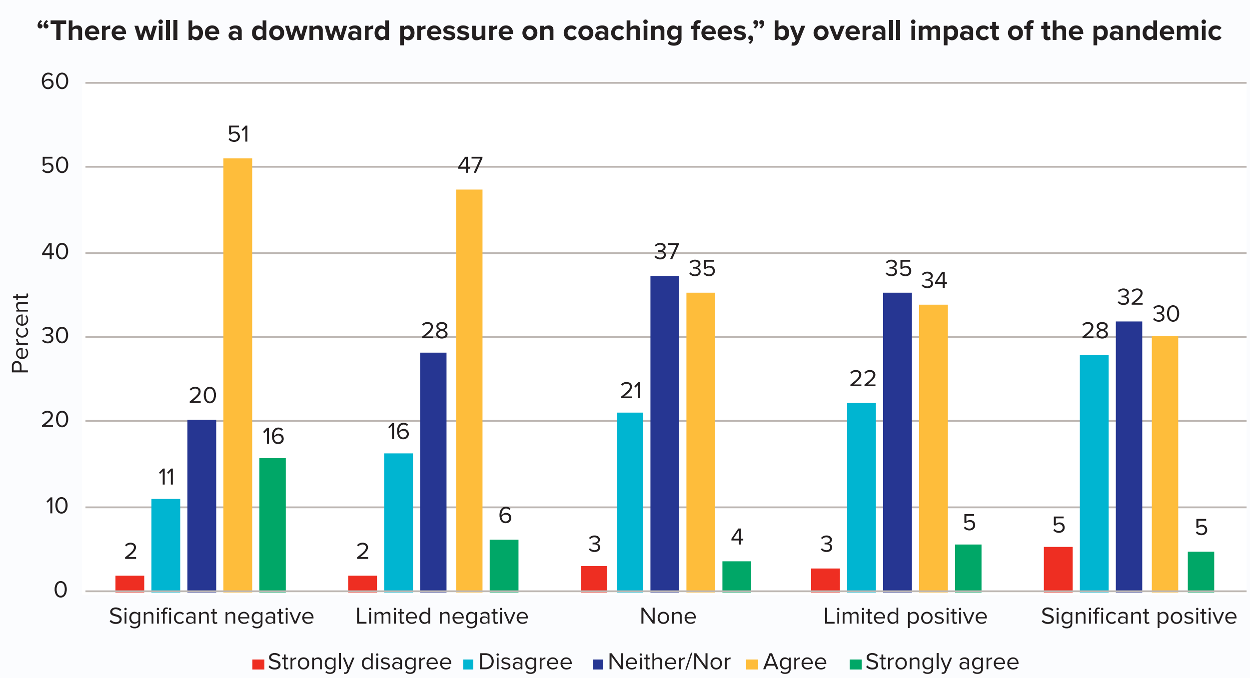
"Life Vision and Enhancement coaching will become more prevalent," by main area of coaching



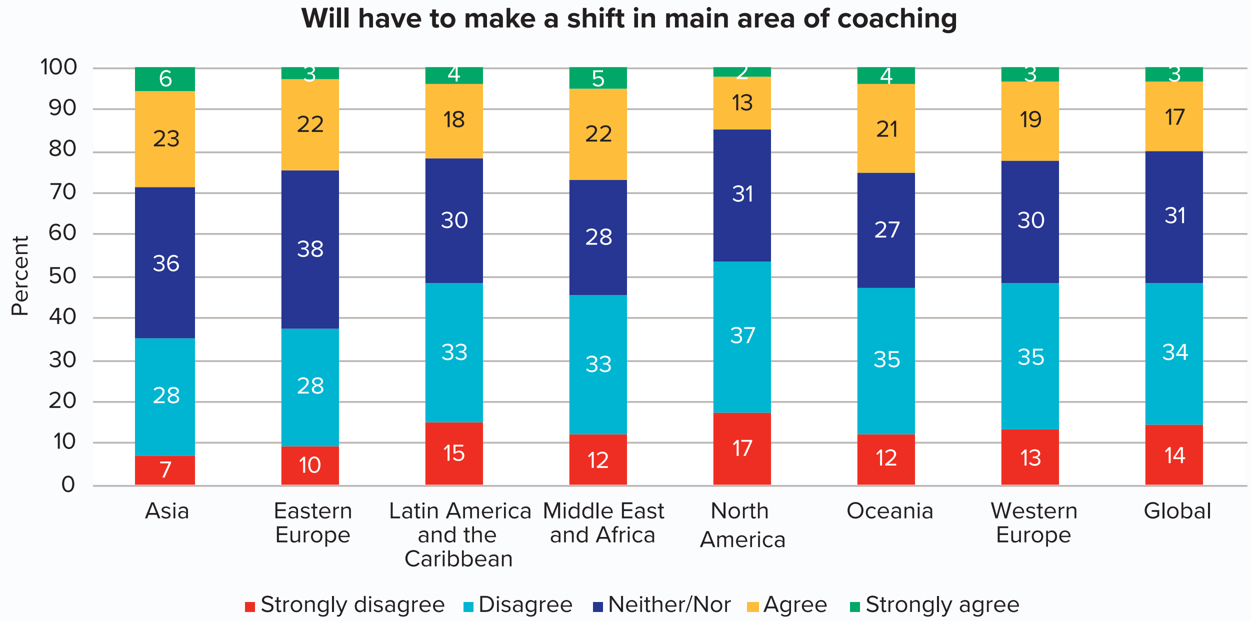
A majority of coach practitioners anticipate that the next six months will see downward pressure on coaching fees, with 42% agreeing that is likely to happen and 7% strongly agreeing.



Expectations regarding coaching fees over the next six months continue to be affected by the direction and severity of the overall impact of the pandemic. Two in three coach practitioners (67%) reporting a significant negative effect from the pandemic agreed (51%) or strongly agreed (16%) that coaching fees will be subject to downward pressure, compared with 35% of those who reported a significant positive effect.

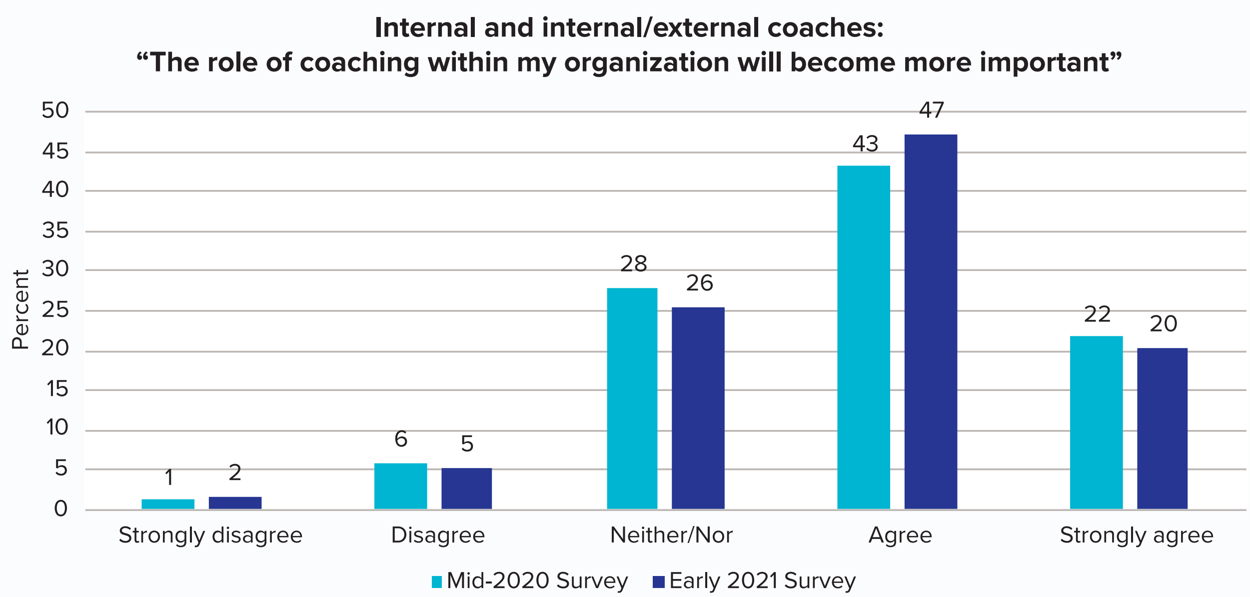


When asked about the likely evolution of their own coaching practice, fewer than one in five (17%) agreed that was a likely response to the pandemic with a further 3% strongly agreeing.

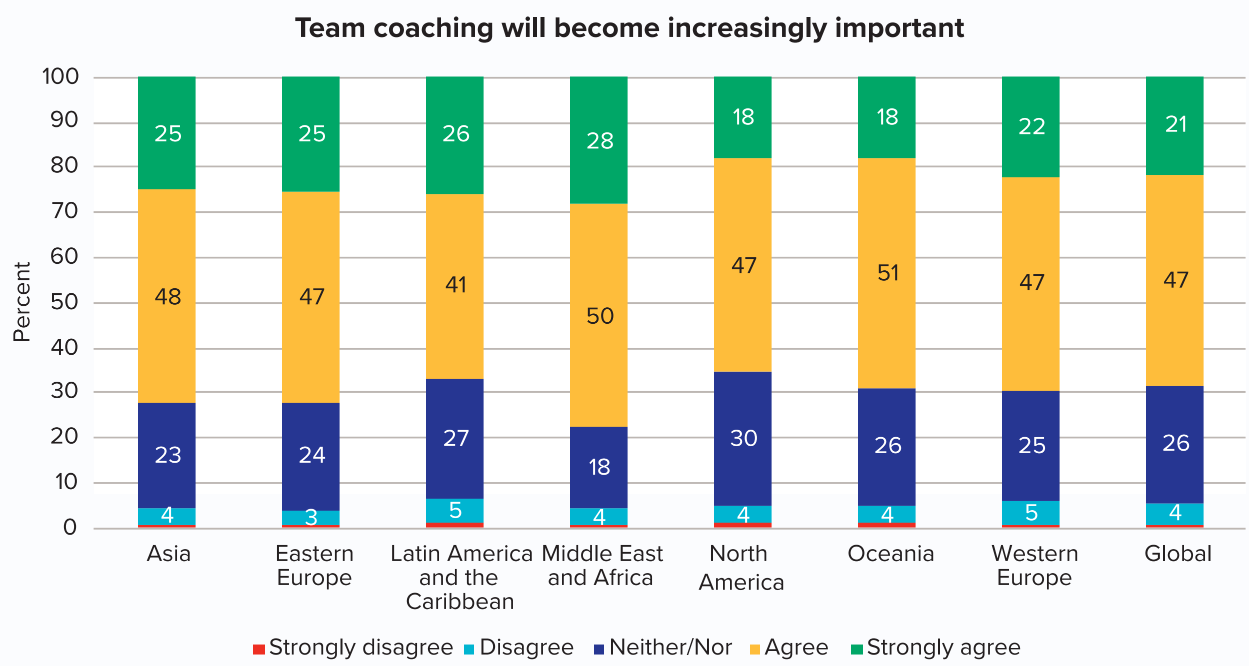


Female coach practitioners were more likely than their male counterparts to agree/strongly agree that they would have to make a shift in their main area of coaching, by a margin of 24% to 18%.

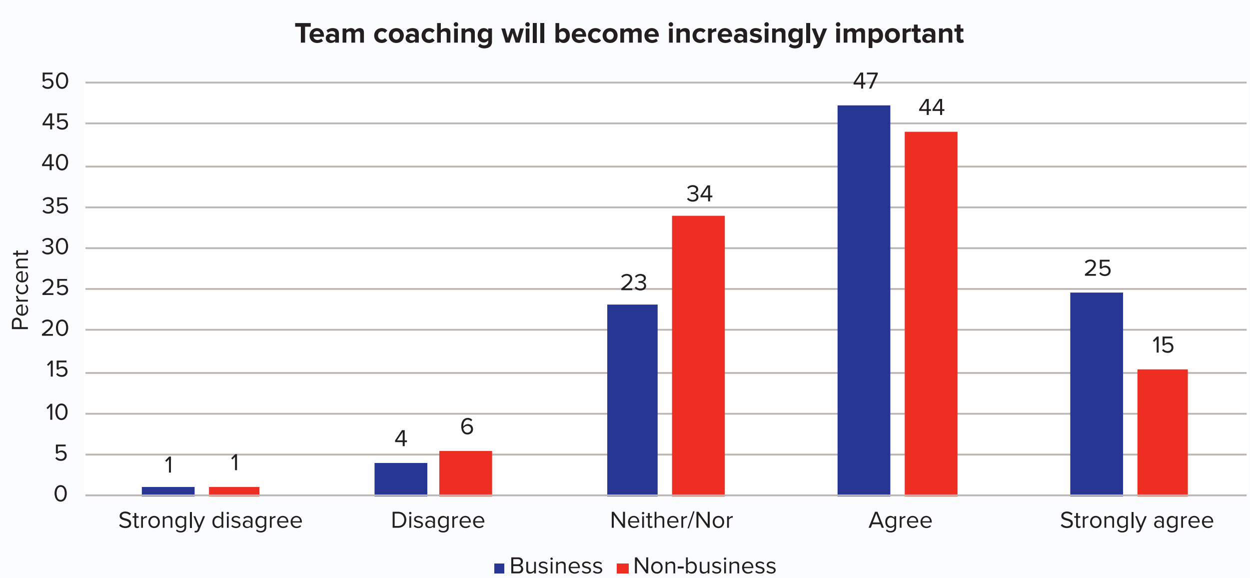
Over two in three (67%) internal coach practitioners and those who practice both internal and external coaching felt that the role of coaching within their organization will become more important over the next six months. The proportion agreeing/strongly agreeing in the early 2021 survey is only marginally higher by comparison with the position in mid-2020 (65%).



Coach practitioners expect that team coaching will become increasingly important, with almost one in two (47%) agreeing with the proposition and over one in five (21%) strongly agreeing.

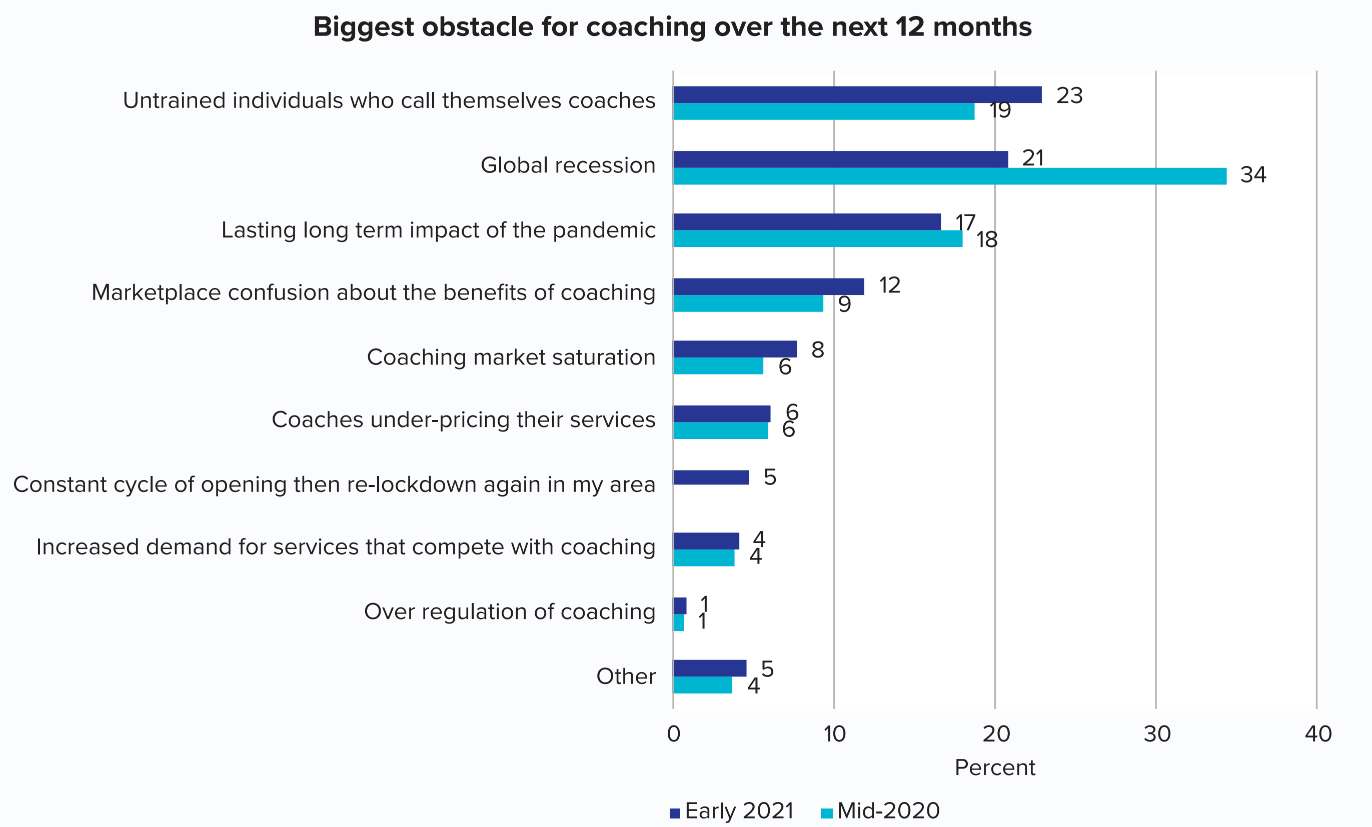


One in four coach practitioners with a Business Coaching specialty (25%) strongly agreed that team coaching will become more prevalent, compared with 15% of coach practitioners with a non-business specialty.

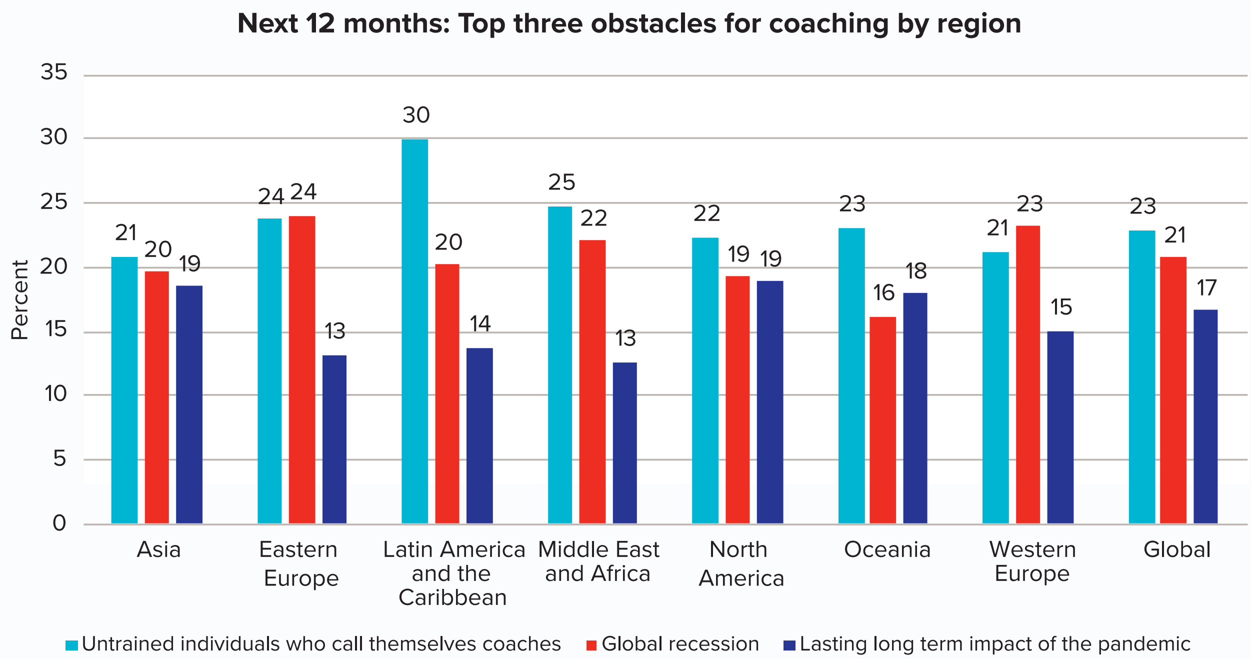


Next 12 months: Obstacles

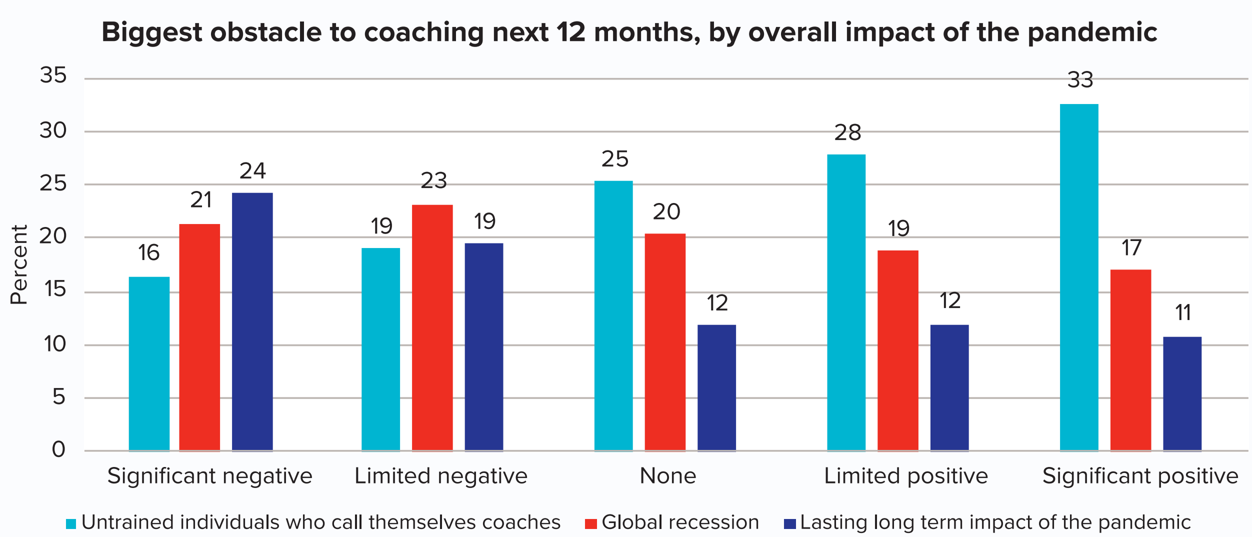
A little under one in four coach practitioners (23%) regard untrained individuals who call themselves coaches to be the biggest obstacle to coaching over the next 12 months, followed closely by the risk of a global recession (21%). The main change compared with respondents' views in mid-2020 is the reduction in the proportion considering a global recession to represent the biggest obstacle over the next 12 months.



The ranking of obstacles over the next 12 months was broadly similar across the regions, but with differences in the emphasis given to the main obstacles.

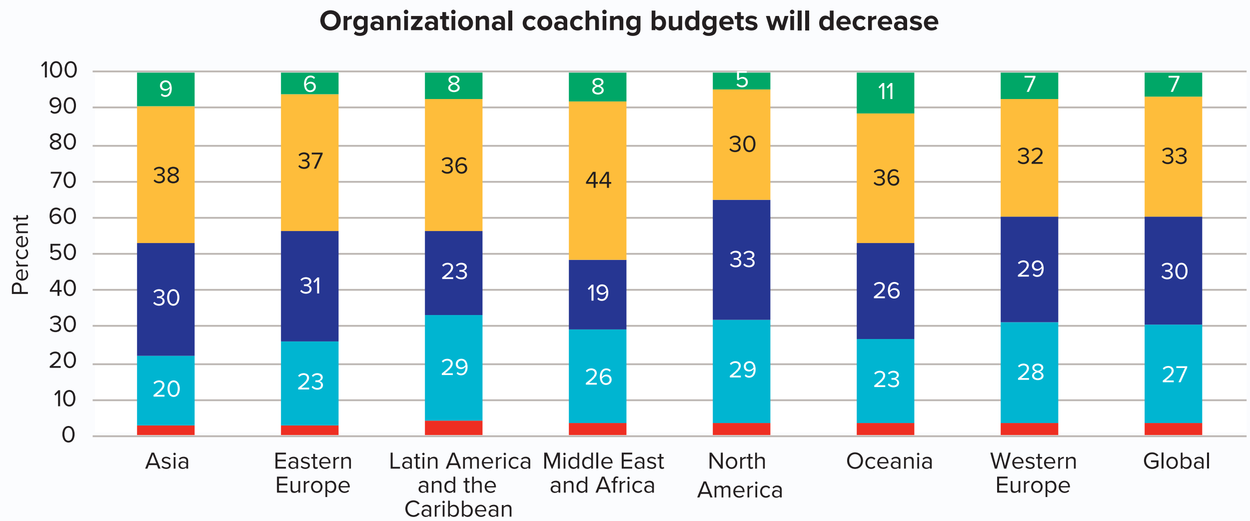


The ranking of the three main obstacles varied sharply according to the overall impact of the pandemic on coach practitioners' practice/business. Those who had experienced a significant negative impact from the pandemic were most concerned about the lasting long-term impact of the pandemic (24%). By contrast, coach practitioners reporting a significant positive impact from the recession regard untrained individuals who call themselves coaches to be the biggest obstacle over the next 12 months (33%).

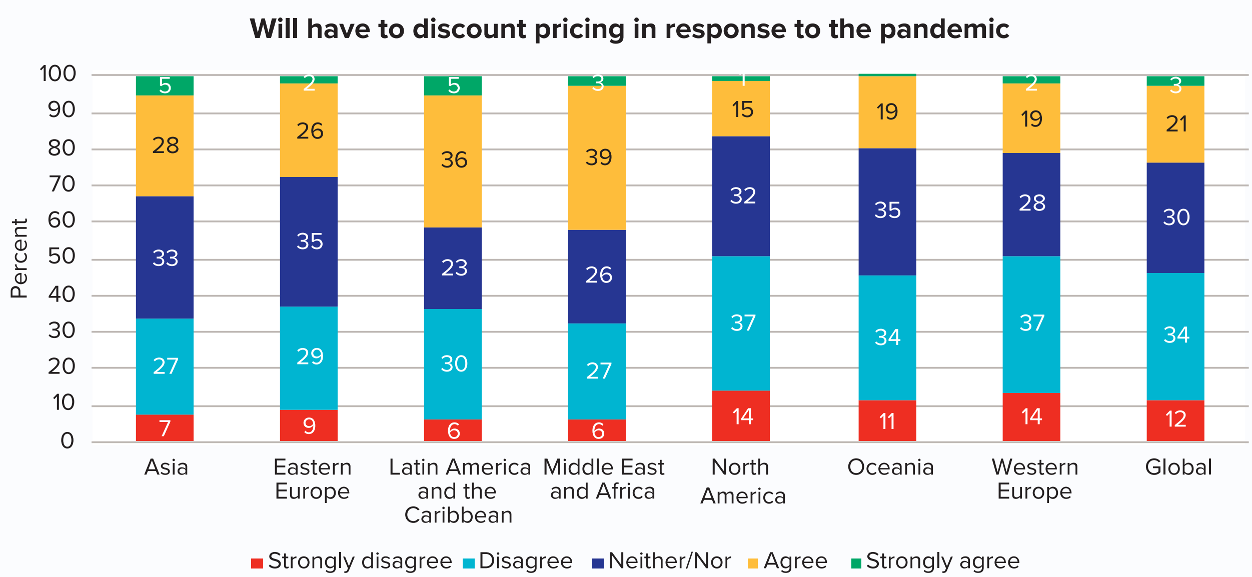


Future of Coaching

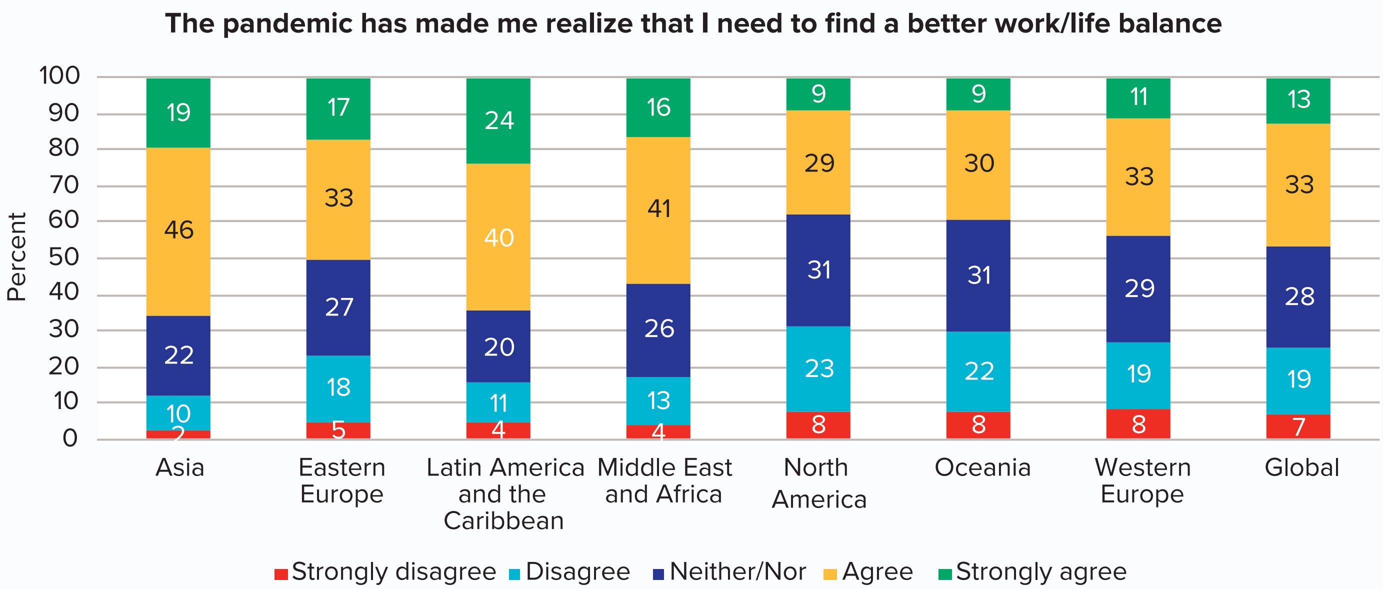
Coach practitioners expect that organizational coaching budgets will decrease in future years. Four in 10 coach practitioners (40%) agreed or strongly agreed that organizational coaching budgets will decrease, compared with 31% disagreeing or strongly disagreeing.



A little under one in four coach practitioners (24%) expect that they will have to discount their pricing in response to the pandemic, ranging from 42% in the Middle East and Africa to 16% in North America.



A plurality of coach practitioners (46%) agreed with the statement that 'the pandemic has made me realize I need to find a better work/life balance', from almost two in three coach practitioners in Asia (66%) to 38% in North America.



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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.*