

GLOBAL COACHING STUDY

2023 Executive Summary

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NOTE: *The figures presented in this report are based on survey responses and therefore rely on the accuracy of the data provided by the survey respondents.*

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Introduction

This is a summary of the findings from the *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.

Structure of the Final 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.

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 |

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.

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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