Study Details and Key Findings

Germany
The Project
Goals

• Build on earlier industry research efforts (2012 and 2007)
• Determine the size and scope of the coaching profession
• Collect insights from growing population of managers/leaders using coaching skills
Survey Process

• Six-month survey period beginning in July 2015
• Available in nine languages
• Designed to be completed using a range of mobile devices
• Promoted through an intensive email and social media campaign
Survey Outcomes

• 15,380 valid survey responses
• 137 countries
• 40 countries with 100-plus survey responses each
Global Reach

2016 ICF Global Coaching Study
Main Findings

The Coaching Continuum

2016 ICF Global Coaching Study
The Coaching Continuum

• 2012 study classified coaches based on self-identification as a professional coach (Y/N)

• Coaching continuum accounts for a wider range of modalities in which coaching approaches and competencies may be applied
  – One end: Managers/leaders who apply coaching skills and approaches in the workplace
  – Other end: Trained, professional coach practitioners
Age and Gender

To which of these age groups and genders do you belong?

![Age and Gender Chart]

Respondent Base: 261

Deutschland  Global

- 25 years and under: 0.5%  41.0%
- 26 to 30 years: 1.5%  33.0%
- 31 to 34 years: 2.3%  59.0%
- 35 to 39 years: 7.7%  67.0%
- 40 to 44 years: 14.6%  14.2%
- 45 to 49 years: 17.2%  27.2%
- 50 to 54 years: 20.3%  18.5%
- 55 to 59 years: 13.6%  15.1%
- 60 to 64 years: 9.6%  10.4%
- 65 years and over: 3.1%  8.9%
Formal Education

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

- **Primary Level (education prior to university)**
  - Deutschland: 11.9%
  - Global: 8.9%

- **Secondary Level (bachelor’s degree)**
  - Deutschland: 22.6%
  - Global: 30.5%

- **Third Level (master’s, doctoral degree)**
  - Deutschland: 65.5%
  - Global: 62.6%

Respondent Base: 261

Deutschland
Global
Years of Coaching Experience

How long have you been coaching?

- **Less than 1 year**
  - Deutschland: 5.4%
  - Global: 8.5%

- **1 to 2 years**
  - Deutschland: 10.8%
  - Global: 14.9%

- **3 to 4 years**
  - Deutschland: 17.9%
  - Global: 19.4%

- **5 to 10 years**
  - Deutschland: 28.3%
  - Global: 30.4%

- **More than 10 years**
  - Deutschland: 26.9%
  - Global: 37.5%

Respondent Base: 240

**2016 ICF Global Coaching Study**
Coaching Specialty

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

- Executive: 31.1%
- Business/Organizations: 17.6%
- Leadership: 15.4%
- Life Vision & Enhancement: 15.1%
- Career: 12.6%
- Cross-cultural: 13.4%
- Relationships (Singles, Couples, Families): 7.8%
- Health and Wellness: 8.2%
- Spirituality: 4.2%
- Small business: 2.1%
- Children/Teens: 0.9%
- Retirement: 0.3%
- Addiction and Recovery: 0.3%
- Other (please specify): 6.9%
- No specialty: 2.0%

Respondent Base: 238

Deutschland
Global

2016 ICF Global Coaching Study
View of Coaching

"I view coaching as..."

- ... a profession: 52.5% (Global) vs 64.6% (Deutschland)
- ... a skill-set: 42.9% (Global) vs 30.1% (Deutschland)
- ... an industry: 4.6% (Global) vs 5.3% (Deutschland)

Respondent Base: 261
Importance of the Credential

To what extent do you agree or disagree that the people and organizations who receive/use coaching expect their coaches to be certified/credentialed?

- Strongly agree: 27.6% (38.5%)
- Somewhat agree: 14.9% (37.8%)
- Neither agree nor disagree: 13.2%
- Somewhat disagree: 7.9%
- Strongly disagree: 2.7%

Respondent Base: 261

Deutschland

Global

2016 ICF Global Coaching Study
Coaching methods

How often do you use each of the following methods to coach active clients?

<table>
<thead>
<tr>
<th>Method</th>
<th>Frequently</th>
<th>Somewhat</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone</td>
<td>36.4%</td>
<td>55.1%</td>
<td>44.7%</td>
</tr>
<tr>
<td>In person</td>
<td>14.4%</td>
<td>34.6%</td>
<td>75.7%</td>
</tr>
<tr>
<td>Audio-video platform</td>
<td>19.6%</td>
<td>24.6%</td>
<td>42.0%</td>
</tr>
<tr>
<td>SMS/Text</td>
<td>13.6%</td>
<td>25.7%</td>
<td>74.4%</td>
</tr>
<tr>
<td>Email</td>
<td>15.5%</td>
<td>47.5%</td>
<td>45.1%</td>
</tr>
<tr>
<td>Instant Messaging</td>
<td>15.5%</td>
<td>87.9%</td>
<td>81.8%</td>
</tr>
<tr>
<td>Other</td>
<td>33.3%</td>
<td>66.7%</td>
<td>46.9%</td>
</tr>
</tbody>
</table>

Respondent Base: 214-214
Main Findings

Clients
Coaching Areas

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

Respondent Base: 238
Age and gender of clients

Please indicate, in percentage terms, the proportion of your active clients within the following age groups and genders.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Deutschland</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>25 years and under</td>
<td>2.3%</td>
<td>4.8%</td>
</tr>
<tr>
<td>26 to 34 years</td>
<td>14.5%</td>
<td>17.8%</td>
</tr>
<tr>
<td>35 to 44 years</td>
<td>37.0%</td>
<td>36.8%</td>
</tr>
<tr>
<td>45 to 54 years</td>
<td>37.7%</td>
<td>30.9%</td>
</tr>
<tr>
<td>55 to 64 years</td>
<td>8.1%</td>
<td>8.7%</td>
</tr>
<tr>
<td>65 years and over</td>
<td>0.5%</td>
<td>1.0%</td>
</tr>
</tbody>
</table>

Respondent Base: 210

2016 ICF Global Coaching Study
Positions of clients

Which of the following positions are held by your coaching clients?

- Manager: 65.7% (Deutschland), 73.1% (Global)
- Executive: 60.4% (Deutschland), 73.5% (Global)
- Business owner/entrepreneur: 57.1% (Deutschland), 56.3% (Global)
- Personal client: 55.0% (Deutschland), 54.2% (Global)
- Team Leader: 51.1% (Deutschland), 60.5% (Global)
- Staff member: 39.5% (Deutschland), 34.0% (Global)
- Other: 5.9% (Deutschland), 8.3% (Global)

*Multiple responses allowed*

Respondent Base: 238

2016 ICF Global Coaching Study
Main Findings

Size of the Profession

2016 ICF Global Coaching Study
Key Statistics—Global

**Total revenue (US$)**

$2.35 Billion

**Memberships**

- ICF: 63%
- Other: 23%
- None: 25%

**Coach practitioners**

- 53,300

**Managers/Leaders using coaching skills**

- 10,900

**Average annual revenue (US$)**

$51,000

**Average fee per 1 hour coaching session (US$)**

$231

**Average number of active clients**

11.0

*Estimates are shown to the nearest 100. Therefore subtotals may not add to the total figures.*

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2016 ICF Global Coaching Study
# Key Statistics – REGION

## Western Europe

**Total revenue (US$)**

$898 Million

**Memberships**

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

**Credentials**

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

**Coach practitioners**

18,800

**Managers/Leaders using coaching skills**

21,400 All coaching modalities

2,700

**Average annual revenue (US$$)**

$55,300

**Average fee per 1 hour coaching session (US$$)**

$288

**Average number of active clients**

10.4
Main Findings

Key Issues and Future Trends

2016 ICF Global Coaching Study
View on Regulation

Should coaching become regulated?

- Yes: 38.4%
- No: 36.3%
- Unsure: 25.3%

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

Respondent Base: 245
Method of Regulation

Who would be best to regulate the coaching industry?

- Government entities
  - Unsure: 13.5%
  - Yes: 84%
- Individual coach practitioners
  - Unsure: 35.9%
  - Yes: 26.8%
- Professional coaching associations
  - Unsure: 35.9%
  - Yes: 56.7%

Respondent Base: 156

Global
Obstacles for the Profession

What do you believe to be the biggest obstacle for coaching over the next 12 months?

- Untrained individuals called coaches: Deutschland 41.2%, Global 44.3%
- Marketplace confusion re: coaching benefits: Deutschland 27.3%, Global 28.9%
- Coaches under-pricing their services: Deutschland 9.0%, Global 4.7%
- Coaching market saturation: Deutschland 8.2%, Global 9.8%
- Over regulation of coaching: Deutschland 6.5%, Global 3.0%
- Increased demand for competing services: Deutschland 3.3%, Global 3.4%
- Other: Deutschland 4.5%, Global 6.0%

Respondent Base: 245

2016 ICF Global Coaching Study
Opportunities for the Profession

What do you believe to be the biggest opportunity for coaching over the next 12 months?

<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Global data</th>
<th>Deutschland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased awareness-Benefits of coaching</td>
<td>37.6%</td>
<td>57.6%</td>
</tr>
<tr>
<td>Credible data - ROI/ROE from coaching</td>
<td>27.2%</td>
<td>13.5%</td>
</tr>
<tr>
<td>Improved general perception of coaching</td>
<td>14.3%</td>
<td>12.2%</td>
</tr>
<tr>
<td>Increased demand for coaching</td>
<td>11.4%</td>
<td>9.8%</td>
</tr>
<tr>
<td>Positive portrayal of coaching in media</td>
<td>6.8%</td>
<td>4.9%</td>
</tr>
<tr>
<td>Other</td>
<td>2.9%</td>
<td>2.0%</td>
</tr>
</tbody>
</table>

Respondent Base: 245
Final Report

• The Coaching Continuum
• Training and Credentialing
• The Client
• Interaction Between the Coach and Client
• The Size and Scope of the Profession
• Summary Business Indicators
• Key Issues and Future Trends
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