



2017 ICF GLOBAL CONSUMER AWARENESS STUDY

EXECUTIVE SUMMARY



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Introduction

This is a summary of the findings from the *2017 ICF Global Consumer Awareness Study*. The project was commissioned by the International Coach Federation (ICF) with the objective of obtaining a robust study of global awareness of the coaching profession among people aged 18 and over. The 2017 study was undertaken by PwC Research.

Founded in 1995, ICF is dedicated to advancing the coaching profession by setting high standards, providing independent certification and building a worldwide network of credentialed coaches. ICF is a global organization, with a membership comprising more than 25,000 professional Personal and Business Coaches located in 130-plus 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.

ICF published its benchmarking Global Consumer Awareness Study in 2010 and published a follow-up to that study in 2014. The 2017 study updates and extends the *2014 ICF Global Consumer Awareness Study*, incorporating 27,134 responses from across 30 countries.

The presentation of findings from the 2017 study is as follows:

- Methodology
- Global Findings
- Established and Emerging Markets
- Across the Generations
- Global Personas
- Key Points Summary



Methodology

Methodology

The 2017 ICF Global Consumer Awareness Study was commissioned by ICF as the third iteration of its industry research on consumer awareness of coaching around the globe. The first study, undertaken in 2010, was conducted across the ICF's top 20 countries as determined by the ICF Members Rank league table. To accomplish this, the survey forming the foundation of the study was delivered in 10 languages. In total, the 20 participating countries represented approximately 90% of the ICF's critical mass of known membership clusters at that point in time. The survey, which was open to respondents aged 25 or older, yielded 15,000 responses (750 from each country).

In 2014, ICF extended the study's geographic coverage to the top 25 countries as determined by the ICF Members Rank league table. In total, the 25 countries represented approximately 89% of ICF's membership at that time. The survey, which was available in 16 languages, had a target sample size of 750 respondents per country. Once again, the survey was limited to respondents aged 25 or older. The 2014 survey yielded 18,810 responses.

The 2017 survey used a consumer panel methodology and further extended geographic coverage to the top 30 countries by ICF membership. It was available in 17 languages. The minimum age for the survey was lowered from 25 to 18, and the target sample size for each country was increased to 900.

Data collection took place online during a seven-week field period from February 16–April 25, 2017. The survey yielded 27,134 valid responses.

Table 1 demonstrates the overlap between the countries included in the 2010, 2014 and 2017 studies. Sixteen of the 30 countries have been part of all three studies, and a further eight have been part of both the 2014 and 2017 studies.

TABLE 1: Participation in research

Country	2017	2014	2010
Argentina	x	x	x
Australia	x	x	x
Belgium	x	x	
Brazil	x	x	x
Canada	x	x	x
China	x	x	
Colombia	x		x
Denmark		x	x
Finland	x	x	
France	x	x	x
Germany	x	x	x
Hong Kong	x		
Hungary	x		
India	x	x	x
Ireland	x		
Italy	x	x	x
Japan	x	x	x
Mexico	x	x	x
Netherlands	x	x	
New Zealand	x		
Norway			x
Peru			x
Poland	x	x	
Russia	x	x	
Singapore	x	x	
South Africa	x	x	x
Spain	x	x	x
Sweden	x	x	x
Switzerland	x	x	x
Turkey	x	x	
UAE	x		
United Kingdom	x	x	x
USA	x	x	x



Global Findings

Global Findings

Awareness of Coaching

Sixty-six percent of all respondents indicated that they were very or somewhat aware of the field of professional Business and/or Life Coaching.

When presented with the definitions for five personal and organizational support professions (namely, coaching, mentoring, consulting, training and counseling) and asked which best describes their view of coaching, 30% of respondents who indicated they were aware of professional coaching selected the ICF definition of coaching. Twenty-six percent of respondents who indicated awareness of coaching selected the definition of mentoring as the one that best describes their view of coaching.

This shows that, while many consumers have a clear understanding of what coaching is and is not, there is still confusion in the marketplace among individuals who believe they know what coaching is but have confused it with another modality.

Figure 1: Awareness of professional coaching

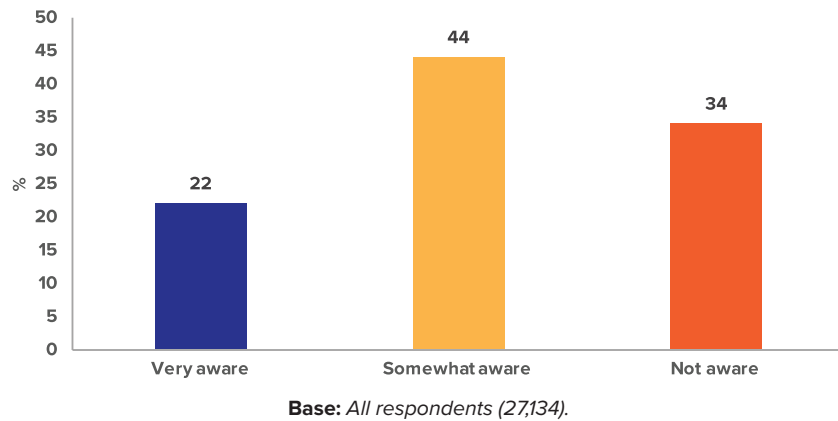
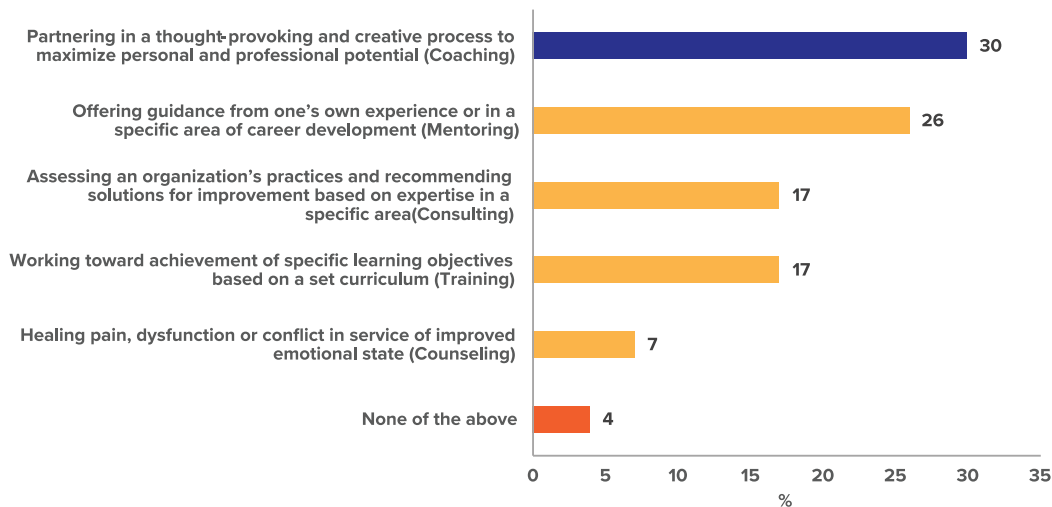


Figure 2: Views on coaching: Respondents saying very or somewhat aware



Base: Respondents saying they are somewhat/very aware of coaching (17,799).

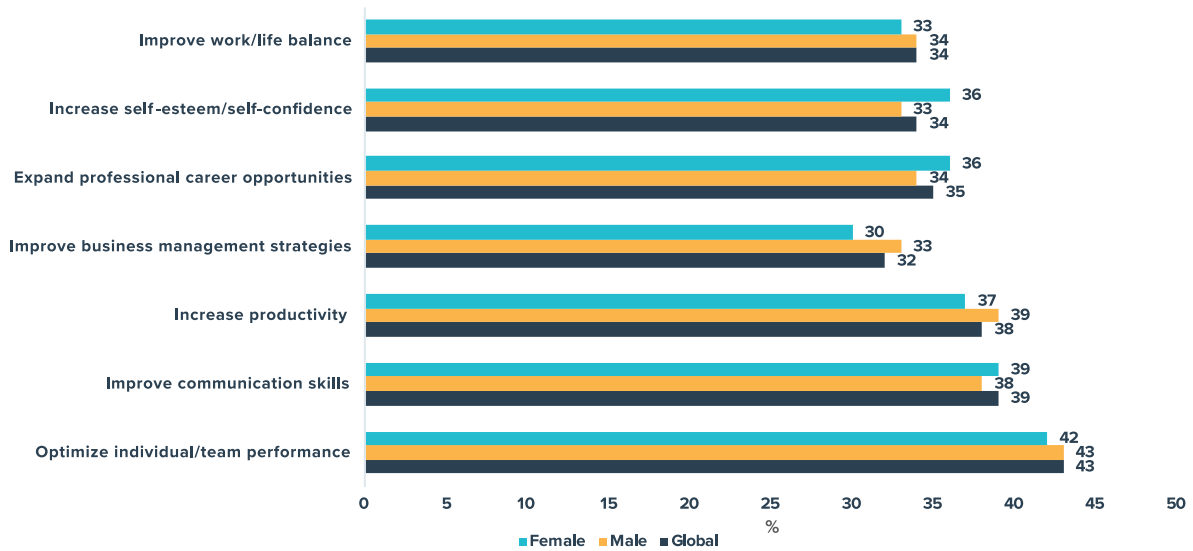
Note: Survey respondents saw a randomized list of definitions, but were not given a list of corresponding words (e.g., mentoring, coaching, etc.). The terms are provided in Figure 2 for readers' reference.

Participation in Coaching

Thirty-one percent of respondents indicated they participated in a professional business and/or life coaching relationship.

When asked why they chose to partner with a coach, the most commonly selected response was to “optimize individual/team work performance” (43%), followed by “improve communication skills” (39%) and “increase productivity” (38%). Female respondents were somewhat more likely than male respondents to partner with a coach to increase self-esteem/self-confidence (36% versus 33%), while male respondents were somewhat more likely to partner with a coach to improve business management strategies (33% versus 30%).

Figure 3: Reasons for participation in coaching



Base: Respondents saying they have participated in a coaching relationship (7,971).

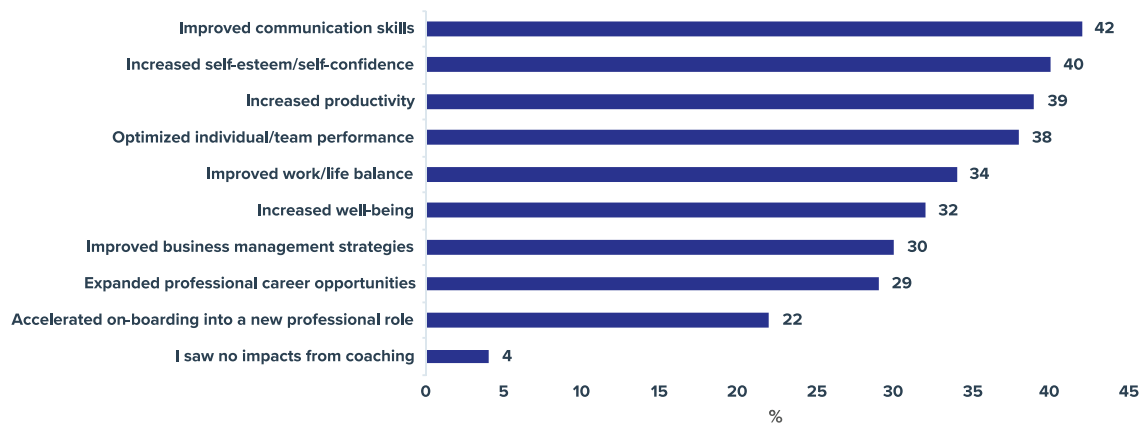
Coaching Outcomes and Satisfaction

Although the most commonly cited reason for pursuing coaching was to optimize individual/team work performance, the most commonly cited outcome was improved communication skills (42%), followed by increased self-esteem/self-confidence (40%) and increased productivity (39%).

When considering the coaching they received, 88% of consumers reported that they were somewhat or very satisfied with the coaching experience.

When asked how likely they were to recommend coaching to a friend or family member, 29% indicated that they were extremely likely to do so. An additional 55% indicated they would be likely to recommend coaching, while only 15% said they were unlikely to recommend coaching.

Figure 4: Outcomes of coaching

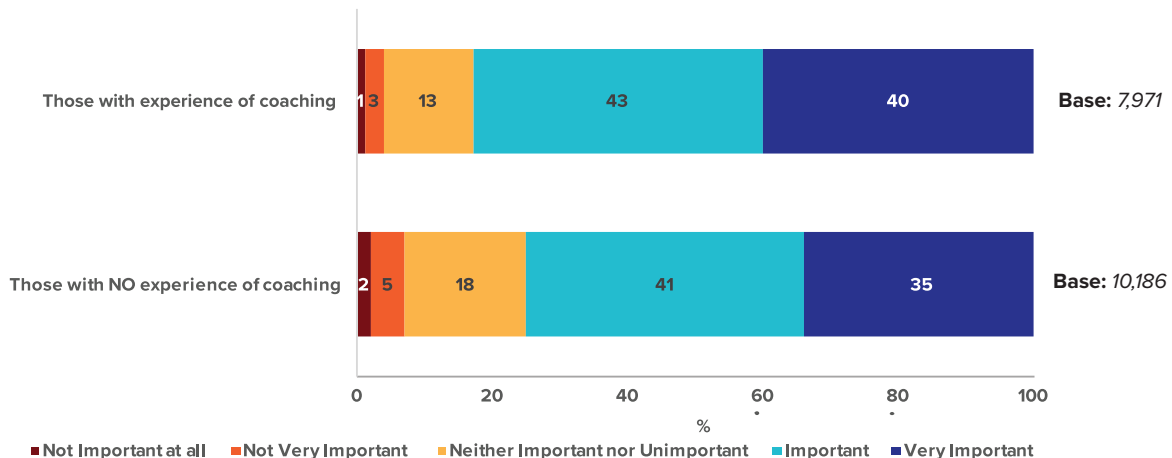


Base: Respondents saying they have participated in a coaching relationship (7,971).

Importance of Certifications/Credentials

Among those with coaching experience, 83% of respondents stated it was either important or very important that their coach has a certification/credential. Interestingly, those who had no experience of coaching also felt coaching certifications/credentials were important, although the proportion of respondents stating certifications/credentials were either important or very important was somewhat smaller (76%).

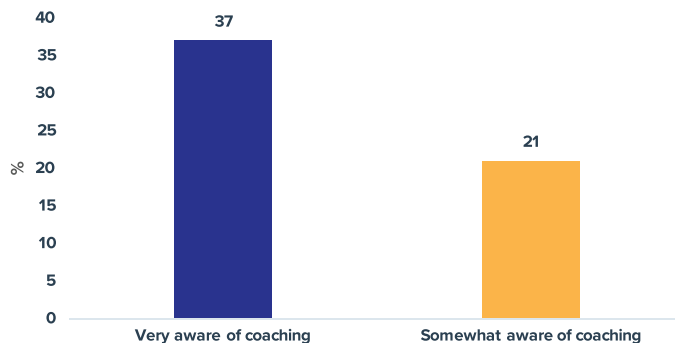
Figure 5: Importance of certifications/credentials



Of the respondents who were coached and indicated their coach held a certification/credential, 94% said they were somewhat or very satisfied with their coaching experience.

A further difference appears when respondents were asked how likely they were to recommend coaching to a friend or family member on a scale of 0-10. Those who selected 9 or 10 were classed as extremely likely to recommend coaching. Figure 5a demonstrates that 37% of respondents who said they were very aware of coaching were extremely likely to recommend it to others.

Figure 5a: How likely to recommend coaching



Base: Respondents saying they are somewhat/very aware of coaching AND have participated in a coaching relationship (7,886).

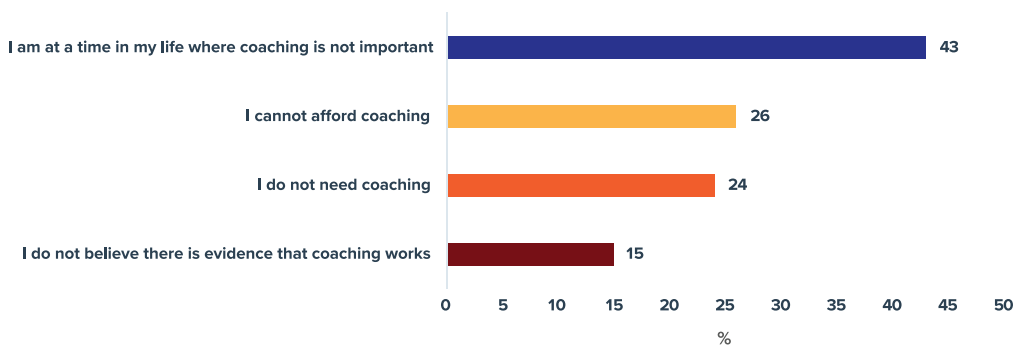
Barriers to Participation

Among respondents who indicated that they were aware of coaching, 56% said they had never participated in a coaching relationship. Of these respondents, 41% indicated that they would not consider participating in a coaching relationship as the coach or client.

For respondents who were aware of coaching but would not consider participating in a coaching relationship, the most cited statement describing why was, “I am at a time in my life where coaching is not important,” (43%), followed by “I cannot afford coaching,” (26%) and “I do not need coaching” (24%).

This shows the necessity for professional coach practitioners of developing a value proposition for clients that highlights the value and benefits of coaching at every age and stage of their personal and professional life.

Figure 6: Barriers to coaching – Respondents who are very/somewhat aware but not considering coaching



Base: Respondents saying they are somewhat/very aware of coaching AND would not consider participating in a coaching relationship (4,149).



Established and Emerging Markets

Established and Emerging Markets

The coaching industry is truly global; however, this hasn't always been the case. Professional coaching first took hold in four English-speaking countries referred to in previous ICF/PwC industry research as the "Big Four": the USA, Canada, the United Kingdom and Australia. From there, the industry spread across continental Europe and, ultimately, to Latin America, the Middle East, Africa and Asia. In the 2014 iteration of this study, participating countries were divided into three blocks: the Big Four, continental Europe (excluding the UK) and all remaining countries.

Since 2014, the proportionate size of the coaching industry across global regions has shifted, rendering these three classifications less helpful than they were in 2014. Instead, to facilitate further analysis, the 30 participating countries in this year's study were divided into two large blocks: Established Markets and Emerging Markets. These are outlined in Table 2 below.

It is useful to briefly reflect the geographical patterns in broad market terms as the population age composition varies considerably. In established markets, people aged 55-plus accounted for substantially higher shares of the survey samples by comparison with the emerging market groups (Table 2). This is in line with the demographic characteristics of the participating territories. As will be seen in this report, awareness of, and participation in professional coaching are both strongly correlated with age.

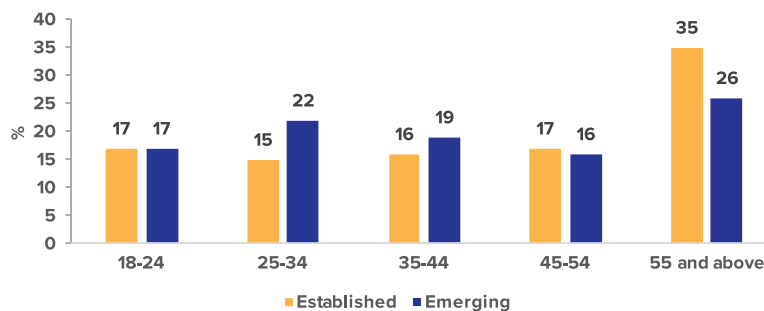
Table 2: Age composition of the study sample by broad market

Age	Established Markets	Emerging Markets	Global
18–24	17%	17%	17%
25–34	15%	22%	19%
35–44	16%	19%	18%
45–54	17%	16%	17%
55 and above	35%	26%	30%
Base	13,547	13,587	27,134
Established Markets	Canada, USA, Australia, New Zealand, Belgium, Finland, France, Germany, Ireland, Italy, Netherlands, Spain, Sweden, Switzerland, UK		
Emerging Markets	China, Hong Kong, India, Japan, Singapore, Hungary, Poland, Russia, Turkey, Argentina, Brazil, Colombia, Mexico, South Africa, UAE		

Awareness Profile

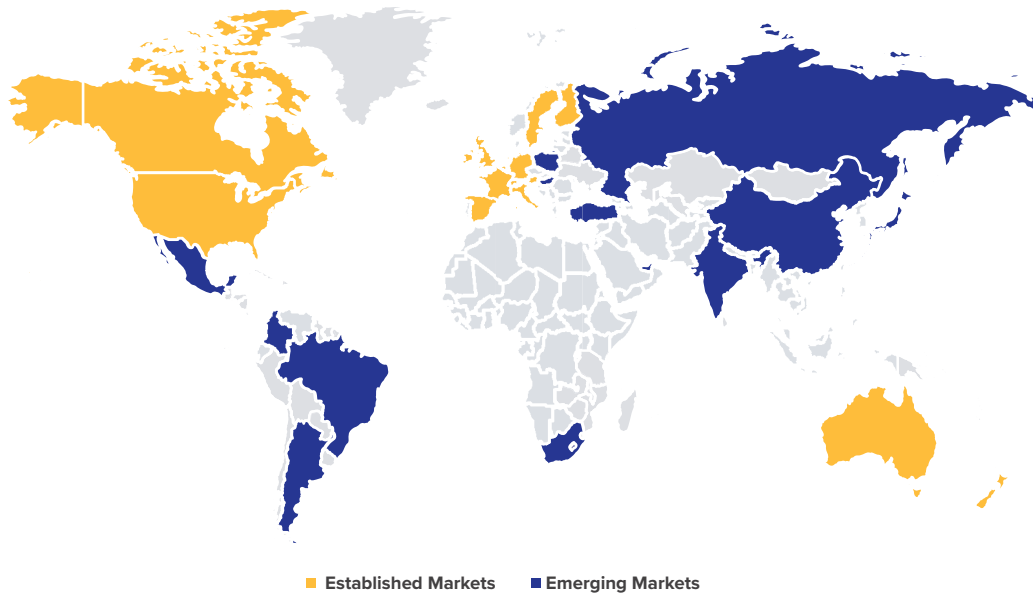
In the Emerging Markets, the profile of respondents tended to be younger, with 22% aged 25–34 compared to 15% in the Established Markets. Of the 25-34 year olds who make up the Millennial generation (discussed further in Section 4) the percentage who said they were very aware of coaching was 31% in Emerging Markets compared to 27% in Established Markets.

Figure 7: Age profile, Established vs. Emerging



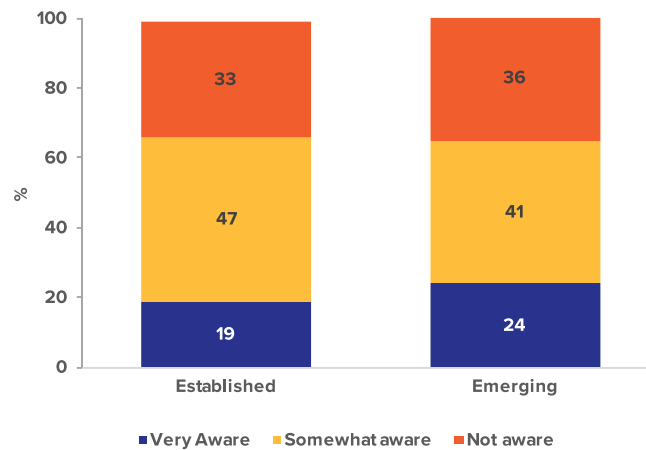
Base: All respondents (27,134).

Established and Emerging Markets – Global Coverage (HEAT MAP)



The proportion of overall respondents indicating they were somewhat or very aware of professional coaching in Established and Emerging Markets was almost identical at 66% and 65% respectively (Figure 8). However, the proportion of respondents who said they were very aware of coaching was 5% lower in Established Markets (19%) than in Emerging Markets (24%).

Figure 8: Awareness: Established vs Emerging



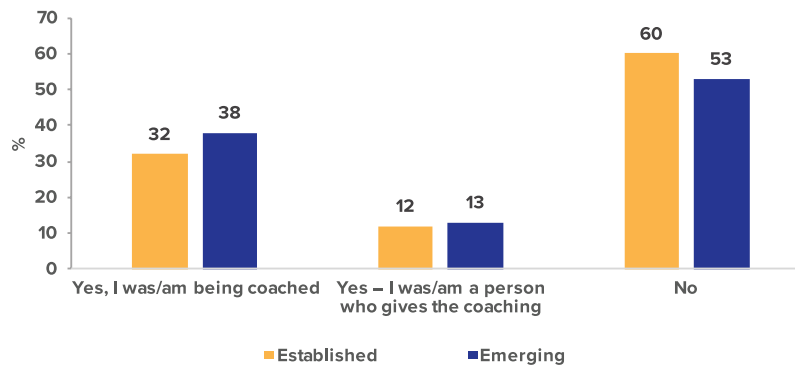
Base: All respondents (27,134).

Participation in Coaching

Participation in coaching as the one being coached was slightly higher in Emerging Markets than Established Markets (38% versus 32%).

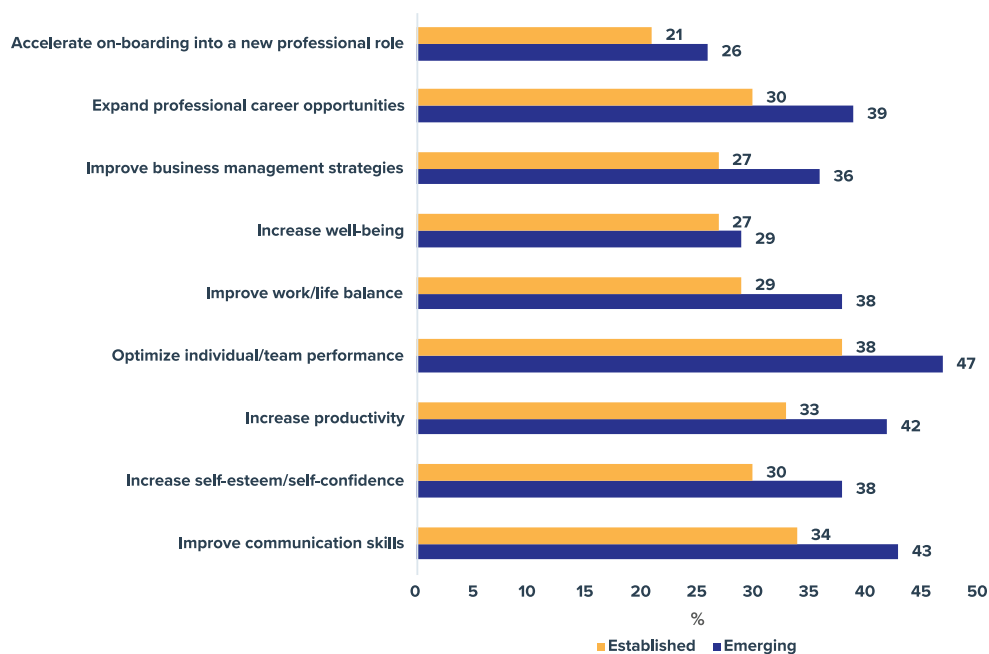
Respondents' top three motivations for seeking coaching were the same in both Established and Emerging Markets; however, there was a significant difference in the proportion of respondents citing each. Optimizing individual/team work performance was ranked first (38% in Established Markets and 47% in Emerging Markets), followed by improving communication skills (34% in Established Markets and 43% in Emerging Markets) and increasing productivity (33% in Established Markets and 42% in Emerging Markets).

Figure 9: Current participation in coaching



Base: Respondents saying they are somewhat/very aware of coaching or somewhat/very aware of the ICF (18,157).

Figure 10: Reasons for participation in coaching



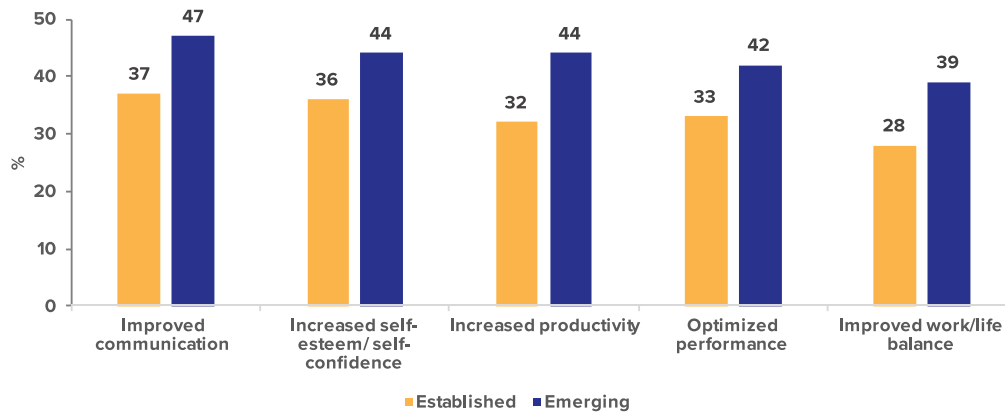
Base: Respondents saying they have participated in a coaching relationship (7,971).

Coaching Outcomes and Satisfaction

For respondents in Established and Emerging Markets, improved communication skills were the most-cited coaching outcome (37% and 47%, respectively), followed by increased self-esteem/self-confidence (36% and 44%, respectively). However, in Emerging Markets, increased productivity was tied with increased self-esteem/self-confidence as the second most-cited outcome (44%), while in Established Markets increased self-esteem/self-confidence was followed by optimized individual/team work performance (33%).

Respondents to this question had the opportunity to select as few or many impacts as they wished; it is notable that respondents in Emerging Markets cited more positive impacts than those in Established Markets.

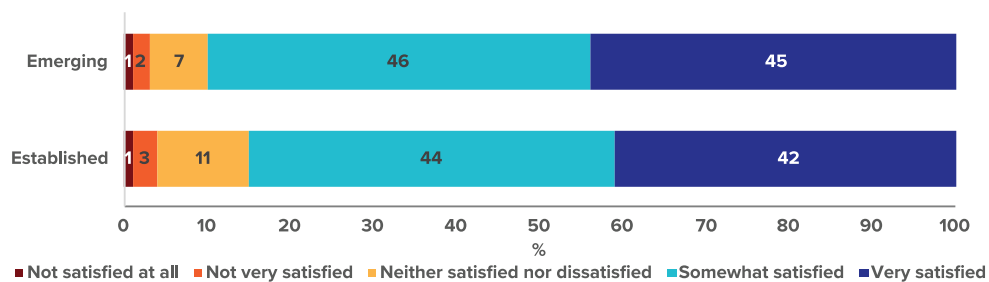
Figure 11: Impacts of coaching



Base: Respondents saying they have participated in a coaching relationship (7,971).

Overall satisfaction for those who have participated in a coaching relationship was high across Established and Emerging Markets. Eighty-six percent of respondents in Established Markets reported as being somewhat or very satisfied; this rose to 91% for respondents in Emerging Markets.

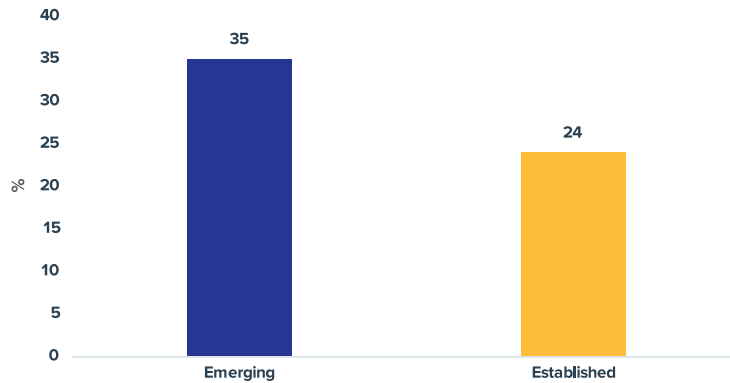
Figure 12: Satisfaction with coaching for those who have participated in a coaching relationship



Base: Respondents saying they have participated in a coaching relationship (7,971).

When asked how likely they are to recommend coaching to a colleague, friend or family member, 24% of individuals in Established Markets said they were very likely to recommend coaching. That number increased to 35% of individuals in Emerging Markets.

Figure 13: Very likely to recommend coaching

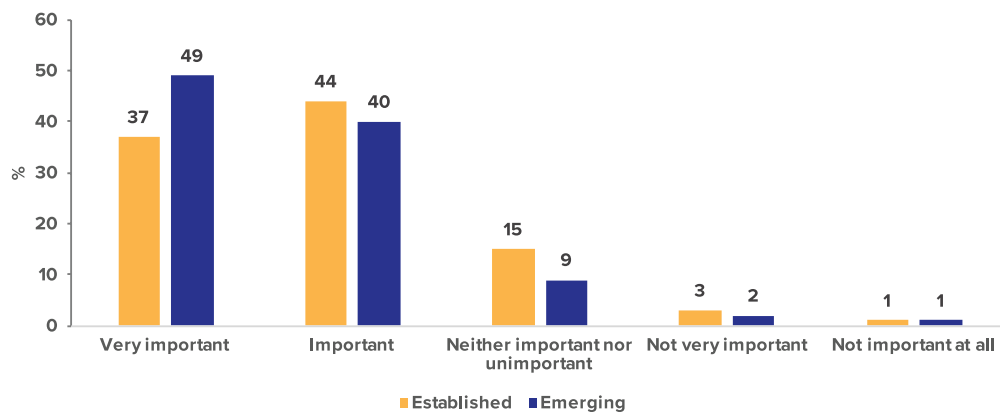


Base: Respondents saying they have participated in a coaching relationship (7,971).

Importance of Credentials/Certification

Among respondents who indicated that they were aware of professional coaching, 79% of individuals in Established Markets and 86% of respondents in Emerging Markets rated it as important or very important for a coach to hold a credential. However, respondents who have participated in a coaching relationship, a difference of 8% appears between the two groups, with 81% of those in Established Markets identifying possession of a credential as important or very important, compared to 89% in Emerging Markets.

Figure 14: Importance of certifications/credentials for those who have participated in a coaching relationship as the person being coached



Base: Respondents saying they have participated in a coaching relationship as a coachee (6,292).

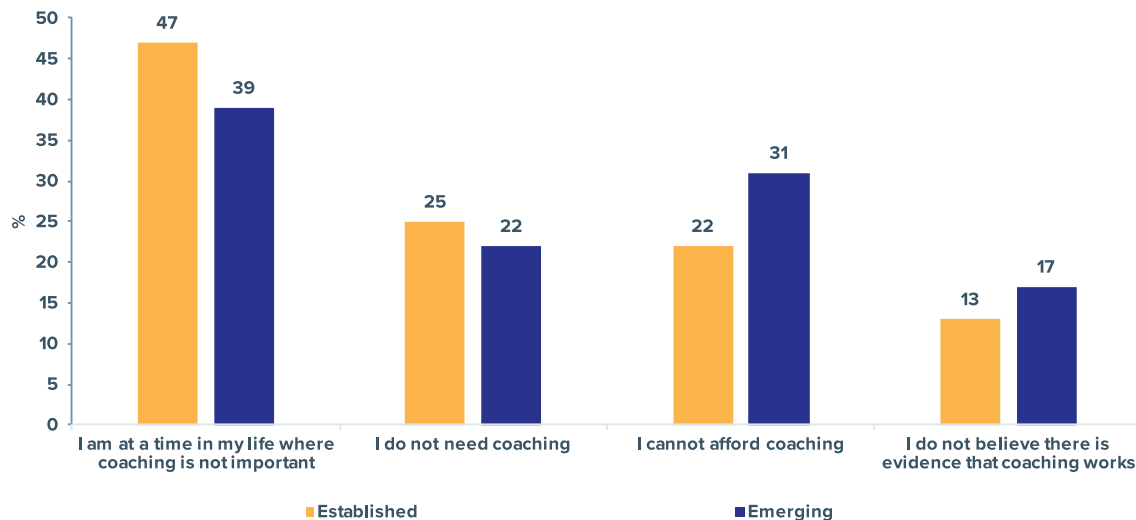
Barriers to Participation

Among respondents who were aware of but had not participated in coaching, there was little difference between markets in the proportion of respondents who said they would not ever consider participating in a coaching relationship (42% in Established Markets and 40% in Emerging Markets).

However, there were significant differences by market in the proportion of respondents who cited certain barriers to participation. Respondents in Established Markets selected, “I am at a time in my life where coaching is not important,” with the greatest frequency (47%). As previously mentioned, the Established Markets had an older age profile, which may account for this data. This was also the top answer for those respondents in Emerging Markets but the percentage who selected this option was lower (39%). In Emerging Markets, the second most-cited reason was, “I cannot afford coaching” (31%), followed by, “I do not need coaching” (22%). In Established Markets, “I do not need coaching,” was the second most-cited reason (25%), while “I cannot afford coaching,” (22%) was third.

This suggests that practitioners’ approach to marketing their services in Emerging and Established Markets should not be one-size-fits-all: Whereas coaches targeting clients in Established Markets may need to focus their efforts on articulating the value proposition for coaching and helping prospective clients see “what’s in it for them,” coaches targeting clients in Emerging Markets will likely need to be more sensitive to how they price their services and how they communicate that pricing to consumers.

Figure 15: Reasons to not participate



Base: Respondents saying they are somewhat/very aware of coaching but would not consider participating in a coaching relationship (4,149).



Across the Generations

Across the Generations

As discussed in the methodology section of this report, the minimum age for participating in the 2017 research study was lowered from 25 to 18 and the target sample size was increased to enable enhanced analysis of consumers by generation. Table 3 shows the generational groupings included in the study, along with the associated years of birth for each and the percentage of the final study sample that they comprised.

Table 3: Generational breakdown

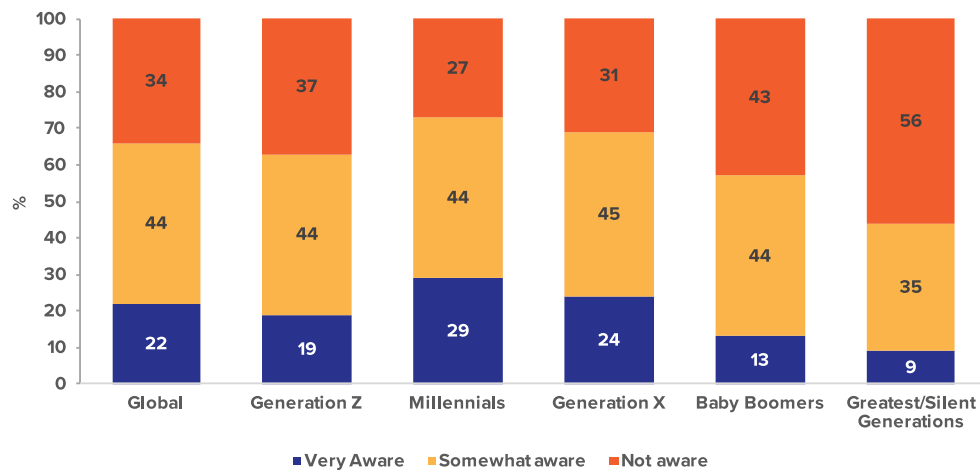
Generation	Birth Years	Proportion of Respondents
Greatest/Silent Generations	1945 and earlier	4%
Baby Boomers	1946–1964	31%
Generation X	1965–1982	32%
Millennials	1983–1996	30%
Generation Z	1997–present	4%

Globally, Millennials are on pace to comprise the majority of the workforce in the near future, and it's essential for coach practitioners to understand their minds and motivations, and to recognize what sets them apart not only from other generations, but from one another. For further analysis, the Millennial generation was further divided into three subgroups: Mature Millennials (born 1983–1986), Core Millennials (1987–1992) and Young Millennials (1993–1996).

Awareness

Millennials showed the highest awareness of coaching, with 73% indicating that they were very or somewhat aware. By contrast, only 44% of respondents in the Greatest/Silent Generations indicated that they were aware of professional coaching.

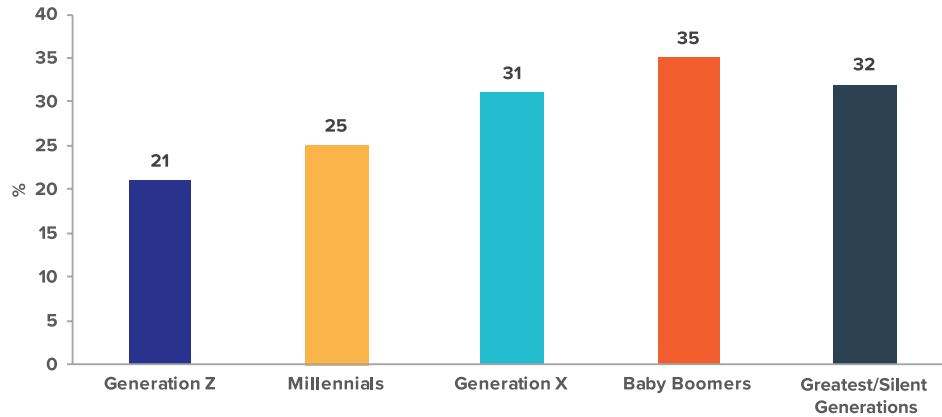
Figure 16: Overall awareness by generation



Base: All respondents (27,134).

Although Millennials' stated awareness of coaching is high, they are less likely than their older counterparts to recognize coaching according to the ICF definition. Only one-fourth (25%) of Millennial respondents who said they were aware of coaching selected "partnering in a thought-provoking and creative process to maximize personal and professional potential" as the definition best describing their view of coaching, as compared with 31% of Generation X respondents, 35% of Baby Boomers and 32% of the Greatest/Silent Generations.

Figure 17: Understanding of ICF's definition of coaching — Generational focus

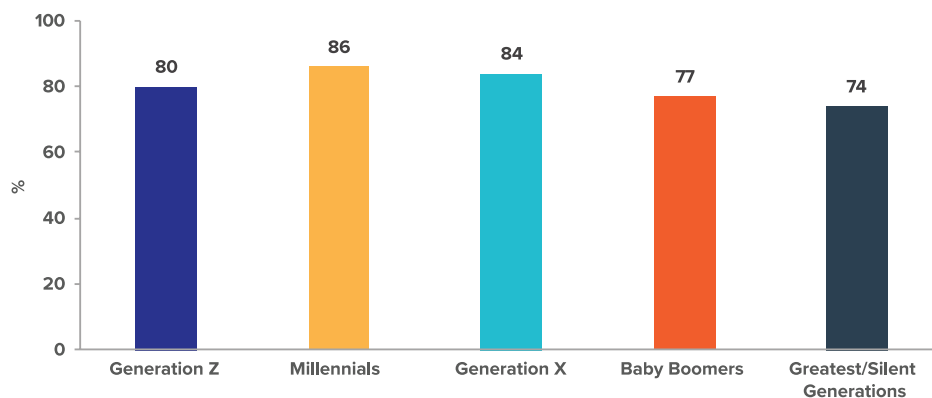


Base: Respondents indicating "somewhat aware" or "very aware" of coaching and selecting "partnering in a thought-provoking and creative process to maximize personal and professional potential" (5,345).

The Importance of Certifications/Credentials

However, when overall respondents were asked how important they believed it was their coach had a credential/certification, 83% stated it was "important" or "very important". Across the generations, this belief was maintained as shown in Figure 18. 80% of Generation Z felt it was important or very important, peaking at 86% for Millennials and steadily dropping again for Generation X (84%), Baby Boomer (77%) and the Greatest/Silent Generations (74%).

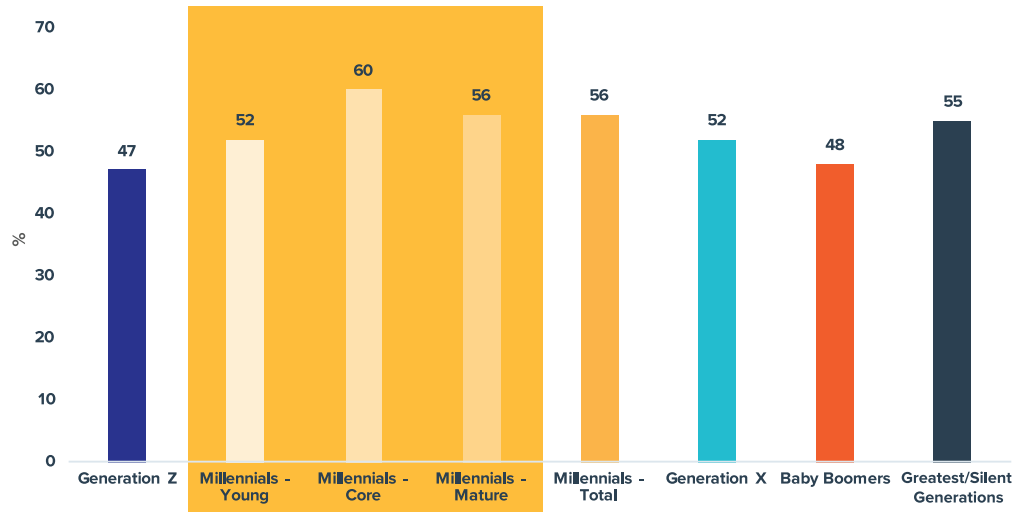
Figure 18: Those who selected certification/credentials as important or very important by generation



Base: Respondents saying they have participated in a coaching relationship (7,971).

Of respondents whose coaches held certifications/credentials, overall satisfaction for Core Millennials was highest among all generations, with 96% indicating that they were satisfied (36% somewhat satisfied and 60% very satisfied) with their coaching experience. In fact, more than half (56%) of all Millennials whose coaches held credentials indicated that they were very satisfied with their coaching experience. While the Greatest/Silent Generations had the lowest level of coaching awareness, a significant portion (55%) of those respondents were very satisfied with their coaching experience.

Figure 18a: Satisfaction across the generations, those who indicated they were very satisfied

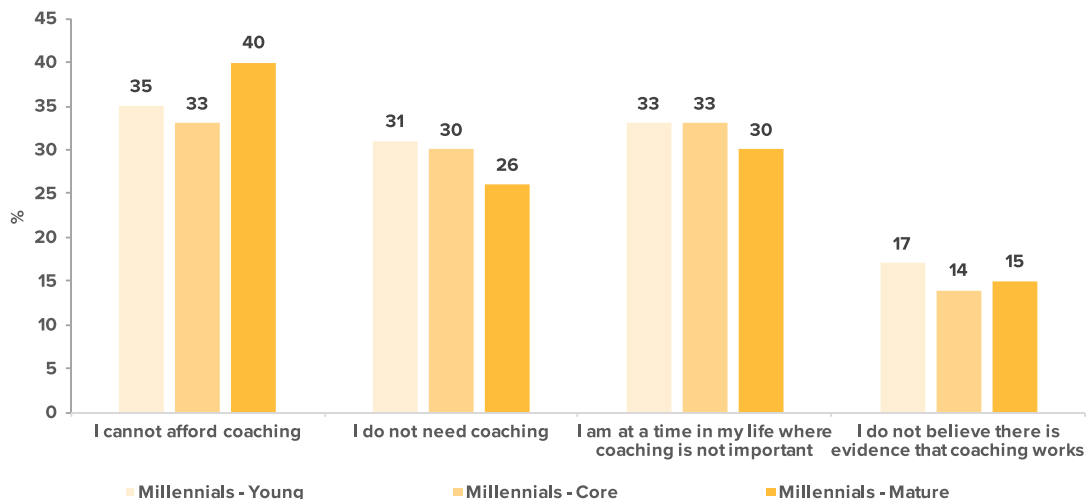


Base: Respondents saying they have participated in a coaching relationship and their coach held a certification/credential (4,786).

Barriers to Participation

Figure 19 shows Millennials’ barriers to participation in coaching from an intra-generational perspective. Interesting differences appear. The No. 1 reason listed overall by Millennials was “I cannot afford coaching” (36%). Mature Millennials as a sub-group identified “I cannot afford coaching” as their main barrier with a response rate of 40%. This is 10% higher than their next prominent barrier, “I am at a time in my life where coaching is not important” (30%). On the other hand, Mature Millennials are somewhat less likely than their Core and Young counterparts to believe that they do not need coaching (26% versus 30% and 31%, respectively).

Figure 19: Barriers to participating – aware but not considering participating



Base: Millennial respondents saying they are “somewhat aware” or “very aware” of coaching but are not considering participating in a coaching relationship (971).



Global Personas

Global Personas

The size and scope of this study yielded a robust data set with ample opportunities for segmentation and analysis. One result of this was the ability to craft a set of personas that help paint a picture of consumers around the globe and their perspectives on professional coaching.

Respondents who said they were not aware of coaching were eliminated from the persona-building exercise. Through factor analysis, consumers who were aware of coaching were segmented into five groups that formed the foundation for the personas presented here.

These personas are designed as tools to enhance understanding of current and prospective coaching consumers. The approach does not suggest that everyone in each persona has the same characteristics; rather, it highlights prevailing themes.

- Has been coached
- Considers herself “somewhat aware” of coaching
- More likely to confuse coaching with counseling (healing pain, improving emotional state)
- Very satisfied with coaching experience
- Pays for own coaching
- Would consider becoming a coach

Gen-Z Ginny



GENDER
Female

AGE
18-24

MARKET
**Established
(North America)**



GENDER
Male

AGE
25-34

MARKET
**Emerging
(Asia)**

- Very aware of coaching
- Has participated in a coaching relationship
- Coaching available to all in workplace
- Coaching paid for by someone else
- Sees coaching as partnering in a thought-provoking and creative process to maximize personal and professional potential
- Satisfied with coaching experience (even split between somewhat and very satisfied)
- Would consider becoming a coach

Millennial Matt

- Very aware of coaching
- More likely to confuse coaching with counseling (healing pain, improving emotional state)
- Very satisfied with coaching experience
- Pays for own coaching
- Would consider becoming a coach

Interested Isabela

GENDER
Female

AGE
25-34

MARKET
Emerging
(Latin America and
the Caribbean)





GENDER
Male

AGE
35-44

MARKET
Emerging
(Latin America and
the Caribbean)

- Very aware of coaching
- Has participated in a coaching relationship
- Coaching is available in his workplace
- Sees coaching as partnering in a thought-provoking and creative process to maximize personal and professional potential
- Somewhat satisfied with coaching experience
- Coaching paid for by someone else
- Would consider becoming a coach

Gen-X Gabriel



GENDER
Male

AGE
53-71

MARKET
**Emerging
(Eastern Europe)**

- Somewhat aware of coaching
- Has participated in a coaching relationship
- Coaching not available in his workplace
- Sees coaching as partnering in a thought-provoking and creative process to maximize personal and professional potential
- Coaching paid for by someone else
- Somewhat satisfied with coaching experience
- Unsure about becoming a coach

Baby Boomer Boris



Key Points Summary

Key Points Summary

- **Globally, overall awareness of the coaching profession is 66%.** This includes consumers who are very or somewhat aware.
- **Willingness to participate is also high,** with half of those who have not participated to date willing to do so in the future. One of the main barriers to coaching is the perception that people are at a time in their life when coaching is not important.
- **Credentials/certifications are considered to be very important,** among both those who have been coached and those who have not.
- Reported **satisfaction with coaching is higher among individuals whose coach held a credential** than those whose coach did not.
- **Awareness of coaching between Emerging and Established Markets is very similar,** and overall satisfaction of those who have been coached is very high. Participation in a coaching relationship as a coachee tends to be higher in the Emerging Markets with 38% being coached compared to 32% in Established Markets. It follows that coaching tends to be more readily available in workplaces in emerging markets than in established. The impacts of coaching between these two market groupings were also different, with emerging markets more likely to report positive benefits from coaching.
- Respondents' top three **motivations for seeking coaching were the same in both Established and Emerging Markets:** optimizing individual/team work performance, improving communication skills and increasing productivity. However, there was a significant difference in the proportion of respondents citing each.
- **Millennials were the generation most likely to be aware of coaching,** with the Greatest/Silent Generations least likely to be aware.
- **Millennials were the generation most likely to perceive possession of a coaching credential as important or very important,** while the Greatest/Silent Generations were least likely to do so.