

EXECUTIVE SUMMARY:

2014 ICF Global Consumer Awareness Study



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Introduction

This is a summary of the findings from the *2014 ICF Global Consumer Awareness Study*. The study 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 25 and over. The 2014 study was undertaken by PwC's International Survey Unit.

Founded in 1995, the ICF is dedicated to advancing the coaching profession by setting high standards, providing independent certification and building a worldwide network of credentialed coaches. The ICF is a global organization, with a membership comprising more than 25,000 professional Personal and Business Coaches located in more than 100 countries.

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

For the 2014 study, a total of 18,810 responses were received across 25 countries. The 2014 study updates and extends the *2010 ICF Global Consumer Awareness Study*, the benchmark study conducted by the ICF. The 2014 study was designed to allow comparisons to be drawn with the 2010 study.

The presentation of findings from the 2014 study is as follows:

- Methodology
- Awareness of the Coaching Profession
- Participation in Coaching
- The Coaching Experience
- Perspectives on Coaching
- Key Points Summary
- Emerging Themes

SECTION 1: Methodology



Methodology

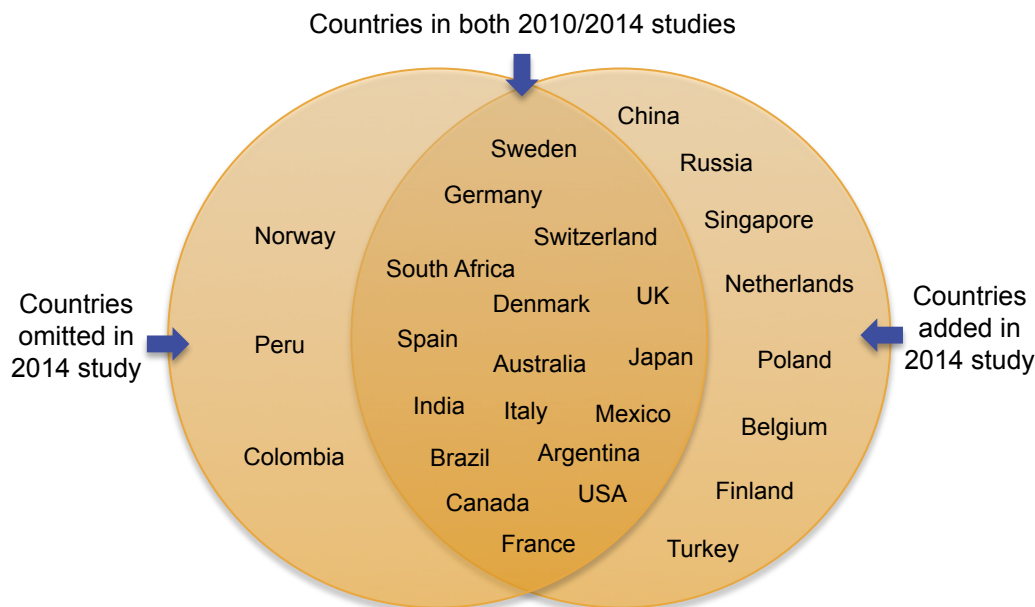
In mid-2010, the ICF commissioned its first study of global consumer awareness of the coaching profession. The 2010 study was conducted across the ICF's top 20 countries as determined by the ICF Members Rank league table. Those countries represented approximately 90% of the ICF's critical mass of known membership clusters. In total, 15,000 responses were achieved (750 from each country) and all respondents were aged 25 or older. For the 2014 study, the geographic coverage was extended to the top 25 countries as determined by the ICF Members Rank league table, representing 89% of the overall membership. The 25 countries included in the 2014 study are listed in Figure 1. Global statistics shown in this report refer to those 25 countries.

Also shown in Figure 1 is the overlap between the countries included in the 2010 and 2014 studies. Thus, 17 of the 25 countries in the 2014 study were also featured in the 2010 study. These 17 countries provide the basis for like-for-like comparisons of changes over time in key indicators, such as awareness of the global coaching profession.

Compared to 2010, the 2014 study includes an additional eight countries. These additional countries reflect the changes that have occurred in the ICF Members Rank league table. Three countries which were included in the 2010 study have been omitted from the 2014 study due to the emergence of other nations entering the top 25.

For each participating country, the target sample size for the 2014 study was set at 750. As a result, the sample size has increased from 15,000 in the 2010 study to 18,810 in the 2014 study¹. Within each of the 25 countries, a consumer panel methodology was implemented to achieve a robust and nationally representative population response base.

Figure 1: Participation in research



¹ Quota flexibility was managed in a small number of cases to achieve sufficient numbers in the older age groups. Hence, achieved sample sizes ranged from 750 to 769.

Data collection was online, spread over a seven-week survey field period from October 28–December 18, 2013. Questionnaires were issued in a total of 16 languages. The main focus of this report is the global survey results from across the 25 participating countries. Geographic contrasts will be elaborated in a series of accompanying country data tables².

Nonetheless, it is useful to briefly reflect the geographical patterns in broad regional terms, where that is relevant, for two reasons. First, four countries account for almost two in three ICF members (i.e. the United States [USA], Canada, the United Kingdom [UK] and Australia). Collectively, these are referred to as the “Big Four” in this report.

Second, outside of the Big Four, it is useful to distinguish between the 13 European countries included in the study (excluding the UK) and the remaining eight countries spread across Latin America, Africa and Asia. The reason is that the population age composition varies considerably across the geographic groups.

In both continental Europe and the Big Four countries, people aged 55+ accounted for substantially higher shares of the survey samples by comparison with the remaining country groups (Table 1). As will be seen in this report, awareness of and participation in professional coaching are both strongly age-related.

Quota flexibility was managed in a small number of cases to achieve sufficient numbers in the older age groups. Hence, achieved sample sizes ranged from 750 to 769.

TABLE 1: Age composition of the study sample by broad region

	Big four countries	Continental Europe countries (excluding UK)	Remaining countries	Global
	%	%	%	%
25-34	20	19	27	22
35-44	19	20	24	21
45-54	21	21	23	22
55 and above	40	40	26	35
Base	3,009	9,770	6,031	18,810
Key				
Big four countries	Australia, Canada, UK, USA			
Continental Europe countries (excluding UK)	Belgium, Denmark, Finland, France, Germany, Italy, Netherlands, Poland, Russia, Spain, Sweden, Switzerland, Turkey			
Remaining countries	Argentina, Brazil, China, India, Japan, Mexico, Singapore, South Africa			

² Available at Coachfederation.org/consumerstudy2014.

SECTION 2:

Awareness of the Coaching Profession



Awareness

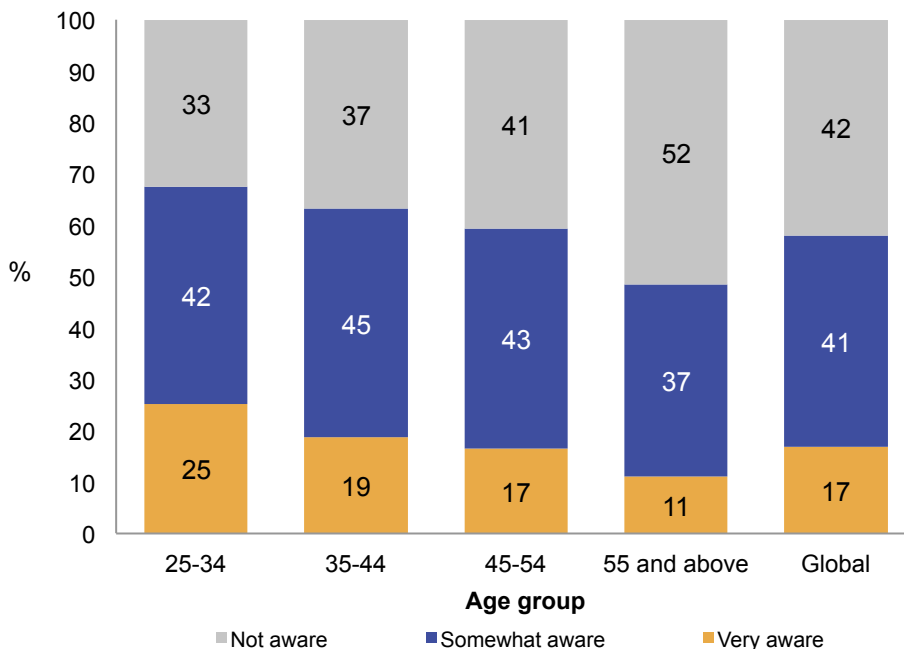
Demographic differences

The demographic dimension is immediately apparent from the contrasts in awareness of professional Business and/or Life Coaching by age group. Among those aged 25-34, two in three (67%) said they were aware of coaching, with one in four (25%) saying they were very aware and 42% saying they were somewhat aware (Figure 2). By contrast, among those aged 55+, fewer than half (48%) expressed some level of awareness.

Across the 25 countries included in the study, the overall level of awareness of coaching was 58%, comprised of 17% saying they were very aware and 41% somewhat aware. Globally, awareness levels hardly differed between males (59%) and females (58%).

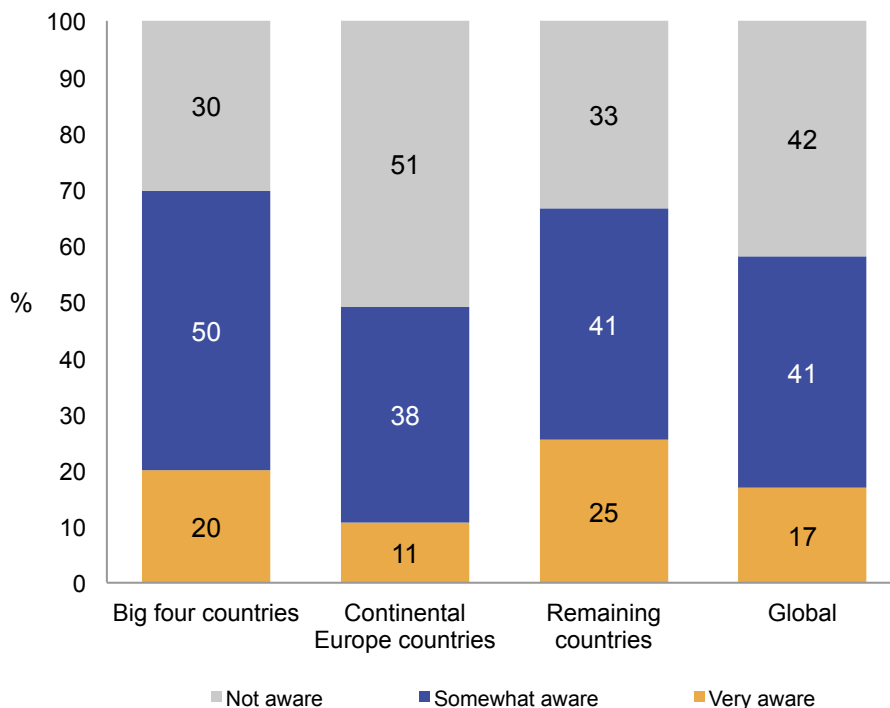
Compared to the global average, respondents in the Big Four countries were significantly more likely to express awareness of coaching (70% overall), well ahead of awareness levels in the continental Europe countries (49%) and slightly in excess of the 66% reported by the remaining countries (Figure 3).

FIGURE 2: Awareness by age group



Base: All respondents (18,810)

FIGURE 3: Awareness by broad country grouping



Base: All respondents (18,810)

With regard to their very similar age profiles, the sharp contrasts between the Big Four and the continental Europe countries indicate that variations in awareness levels are not driven by demographic factors alone.

To that extent, it is interesting to note that, spanning the data collection periods from 2010 to 2013, awareness increased in those continental Europe countries for which comparisons can be made. Overall awareness rose +9 percentage points in the continental Europe countries, comprised of +4 percentage points increase in those saying they were “very aware” and a +5 percentage points uplift in the proportion saying they were “somewhat aware” (Figure 4).

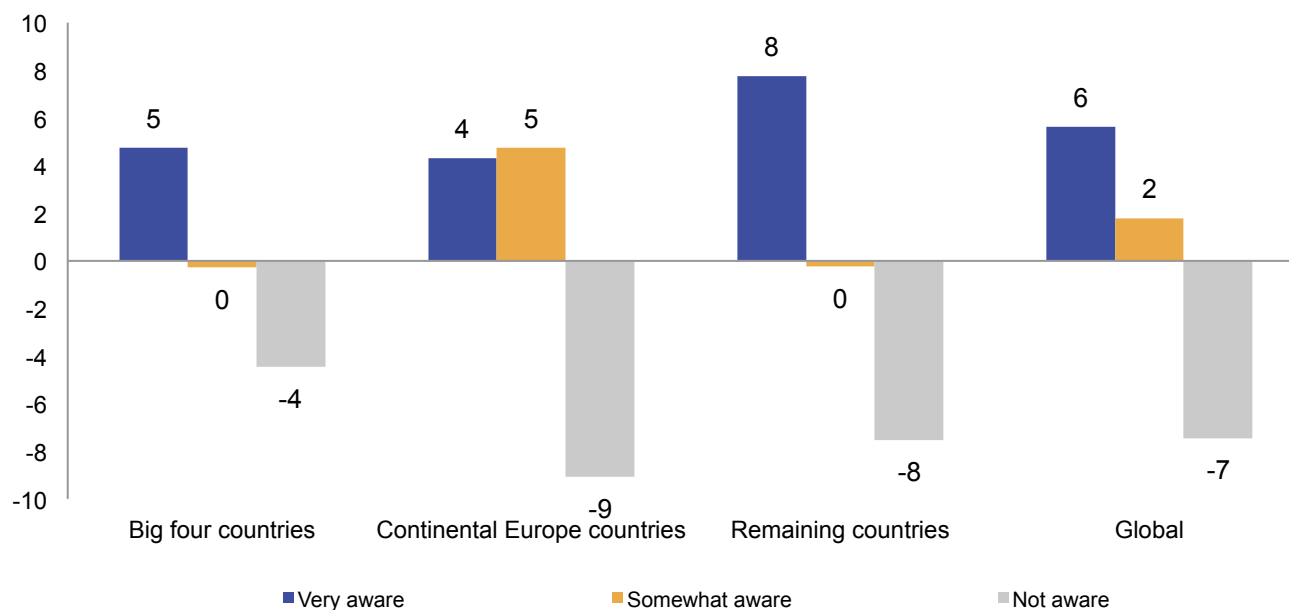
Awareness also rose in the Big Four countries, mainly due to a rise in the proportion saying they were “very aware” (up +5 percentage points, from 15% in 2010 to 20% in 2013).

The increased awareness in the Big Four and continental Europe countries can be seen in the context of the difficult economic climate facing their economies in recent years, especially Europe, where economic growth was below 2% per annum in each year from 2010 through 2013.

It is not possible from the study findings alone to say why awareness has risen. The range of potential factors includes outreach work to promote the profession and stimulate awareness. Also, in times of change, there may be increased interest in the areas addressed by coaching, such as personal growth and building self-esteem and confidence, which help people seeking to make transitions in their lives³.

It is also conceivable that there is an increasing overlap between coaching specialties, such as Leadership Coaching and Executive Coaching, and the needs of organizations seeking to adapt to the difficult economic circumstances of recent years.

FIGURE 4: Change in awareness by broad country grouping, 2010 to 2013, percentage points difference



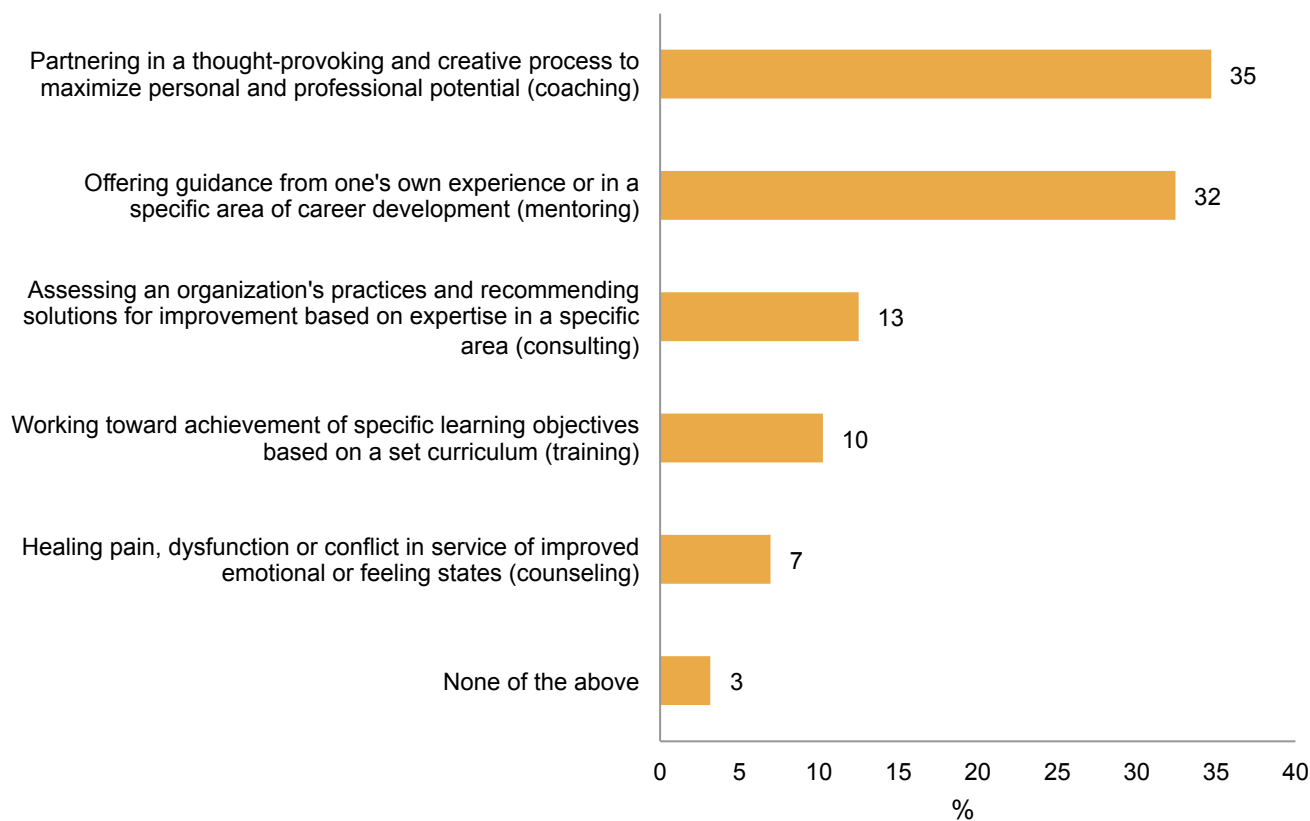
Base: All countries included in both 2010 and 2014 studies (12,801).

³ The 2012 ICF Global Coaching Study provides statistics on the main areas addressed by coaches in their interactions with clients.

Awareness also increased in the remaining countries outside the Big Four and continental Europe, by a margin of eight percentage points among those saying they are very aware of coaching. This may reflect that this country grouping includes emerging nations where coaching has been growing in tandem with development of the wider economy (e.g., in Latin America and South Africa). On average, these countries have younger age profiles than the Big Four and continental Europe and, as noted above awareness tends to be higher in the younger age groups⁴. However, the demographic profile is unlikely to account for all of the positive shift in awareness.

Those who said they were very or somewhat aware of coaching were also given a list of statement definitions for various helping professions and asked to indicate which of those *best* describes their view of coaching.⁵ The results are summarized in Figure 5. As can be seen, the ICF’s own definition of coaching was most frequently chosen (35%).

FIGURE 5: Views on coaching: Respondents saying very or somewhat aware



Base: Respondents indicating “somewhat aware” or “very aware” of coaching (10,917).

⁴ There are exceptions within that broad grouping, notably Japan, where 50% of the survey respondents are in the 55+ age group.
⁵ Respondents were not prompted with the names of the other services.

The survey respondents were also asked to indicate if they are aware of the International Coach Federation (ICF). Overall, one in five (20%) expressed some level of awareness, with 4% saying they were very aware and 16% indicating they were somewhat aware.

Reflecting the pattern in overall awareness, those aged 25-34 were most likely to say they are aware of the ICF (27%) while respondents in the 55+ age group were least likely to express awareness (14%).

Regarding the country groupings, 13% of respondents from the Big Four countries said they are aware of the ICF. The proportion was similar among respondents from continental Europe (14%) and highest in the remaining countries (35%). The more elevated ICF profile in the countries outside the Big Four and continental Europe may reflect more rapid growth in the number of coaches in the emerging regions of Latin America, Africa and Asia, which is reflected in ICF Membership trends and also the findings from the *2012 ICF Global Coaching Study*.

Given ICF's role as the global voice for the coaching industry, it is perhaps not surprising that awareness of the organization was strongly linked to awareness of coaching. Among those with some awareness of coaching, almost one in three (33%) said they were also aware of the ICF. In the remainder of this report, awareness of coaching should be understood to encompass those saying they are aware of coaching and/or the ICF.

SECTION 3: Participation in Coaching



Participation in Coaching

Coaching participants

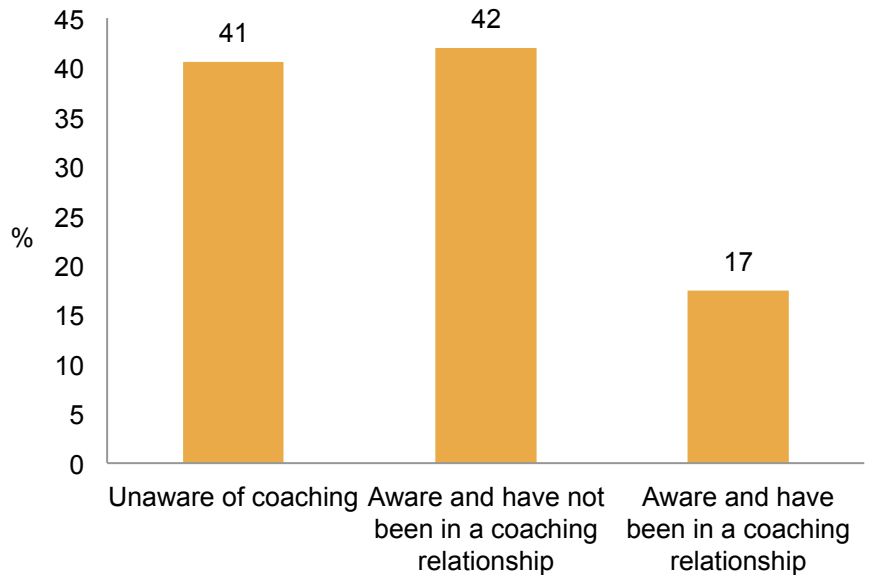
The overall pattern of participation in a coaching engagement is summarized in Figure 6. In total, 17% said they had been in a coaching relationship previously.

When compared to the 2010 findings on a like-for-like basis, the proportion saying they are aware of coaching but had not to date been in a coaching relationship increased by seven percentage points, ranging from +1 percentage point in the Big Four to +9 percentage points in the remaining countries (Figure 7).

The proportions saying they had received and/or given coaching increased by an average of +2 percentage points in continental Europe and the Big Four. In the remaining countries, there was no discernible change in the proportion saying they had been in a coaching relationship.

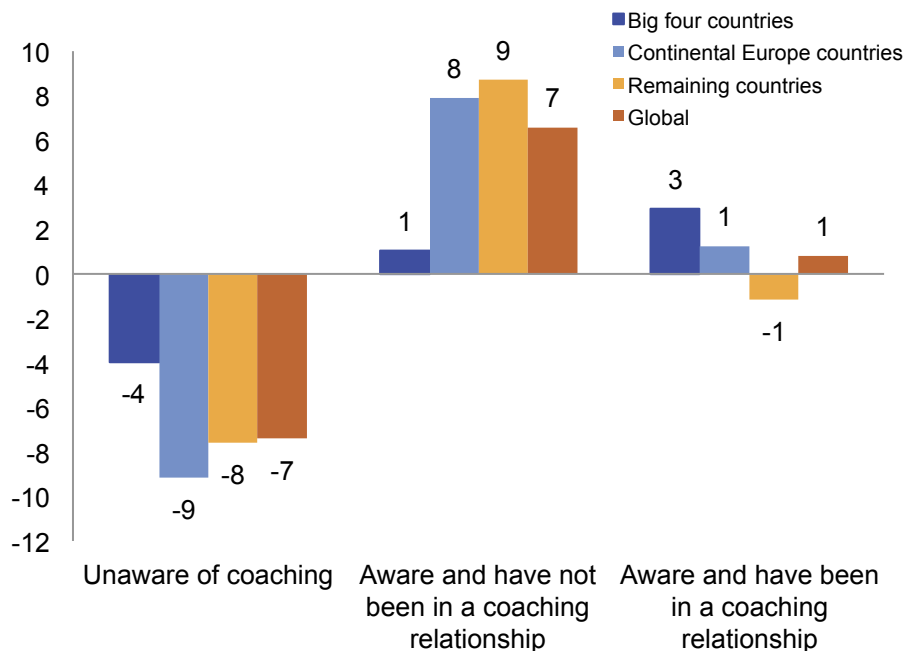
Overall, in continental Europe and the rest of the world countries, the increase in awareness of coaching between 2010 and 2013 had only partially converted into increased participation in coaching.

FIGURE 6: Participation in coaching



Base: All respondents (18,810).

FIGURE 7: Participation in coaching, 2010 to 2013, percentage points difference



Base: All countries included in both 2010 and 2014 studies (12,801).

Consider coaching

Those respondents who had not to date participated in a coaching relationship were asked to indicate if they would consider participating in a professional Business and/or Life Coaching relationship⁶. The main source of variation in the responses was between those saying they were aware of coaching compared to those who were unaware. Among those who are not aware, fewer than one in five (19%) said that they would consider a coaching relationship as the person being coached (Table 2). By contrast, among the aware, 47% said they would consider a coaching relationship as the person being coached. The contrast highlights the importance of building awareness in seeking to stimulate progression to a coaching relationship.

The second point to note from Table 2 is that the willingness to consider participation in a coaching relationship varies by age group. Among the unaware, 30% of those aged 25-34 said they would consider a coaching relationship, falling to 11% of those aged 55+.

Similarly, 34% of those aged 55+ who are aware of coaching said they would consider a coaching relationship as the person being coached, compared with 54% of those in the other age groups.

The contrasts by age do not therefore simply reflect differences in awareness. When asked why they would *not* consider participating in a coaching relationship, more than half (54%) of those aged 55+ said that they were at a time in their lives where coaching is not important (Table 3).

TABLE 2: Consider participation in a coaching relationship as the person being coached? Percent saying “yes” by awareness and age group

	Unaware	Aware	Global
	%	%	%
25-34	30	55	44
35-44	26	55	42
45-54	21	52	37
55 and above	11	34	21
Global	19	47	33
Base: Have not participated in a coaching relationship	7,634	7,899	15,533

TABLE 3: Why not consider participation in coaching, by age group

	25-34	35-44	45-54	55 and above	Global
	%	%	%	%	%
Cannot afford coaching	34	32	30	16	24
Do not need coaching	35	31	30	23	28
At a time in life where coaching is not important	28	29	33	54	42
Do not believe there is evidence that coaching works	19	18	19	11	15
Other	4	5	5	9	7
Base: Would not consider participation in a coaching relationship	926	983	1,139	3,042	6,090

⁶ When asked if they would consider coaching, those who had previously said they were not aware of coaching were prompted with the ICF definition of coaching.

The younger age groups were more likely to focus on factors such as their perceived absence of need for coaching, ranging from 35% of those aged 25-34 to 30% of 45-54 year olds. Similarly, people in the younger age groups were more likely to identify affordability as a constraint on participation in coaching. That factor was cited by 34% in the 25-34 age group, compared to 16% of those aged 55+.

The demographic factor is also clearly evident from the regional variations in the effect of time of life, as respondents in the regions with an older population age profile were more likely to say they would not consider participating due to their time in life. Thus, across the Big Four countries, 50% of all who said they would not consider participating said they were at a time in their life when coaching is not important (Table 4). The proportion was 42% in the continental Europe countries. In the remaining countries with their younger population age profiles, the proportion citing time of life was only 34%.

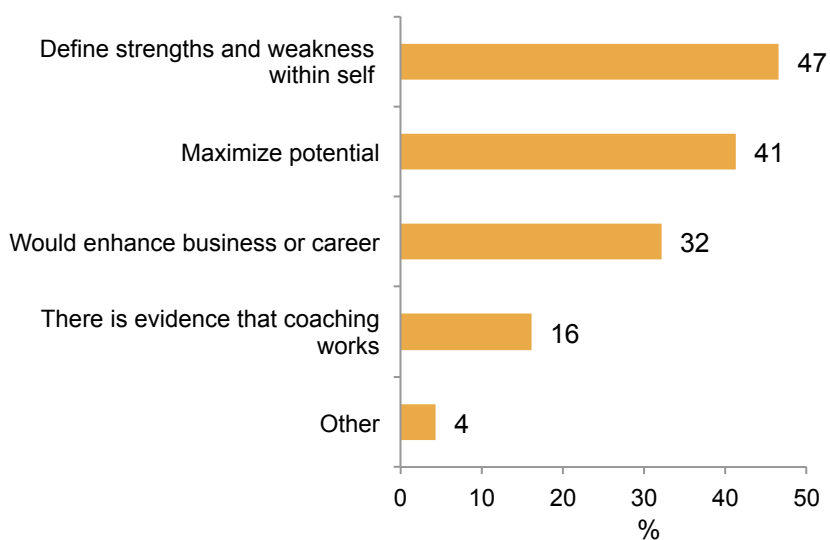
By contrast, affordability was less often cited as a constraint in the Big Four countries (26%) and continental Europe (21%) as compared with the remaining countries grouping (33%).

Respondents unaware of coaching and who said they would consider a coaching relationship were asked why they would consider coaching. The responses are shown in Figure 8 and give some indication of the factors that may help to trigger further participation in a coaching relationship. Almost half (47%) said they would want to define their own strengths and weaknesses, followed by a desire to maximize their own potential (41%).

TABLE 4: Why not consider participation in coaching, by region

	Big Four Countries	Continental Europe Countries	Remaining Countries	Global
	%	%	%	%
Cannot afford coaching	26	21	33	24
Do not need coaching	25	30	23	28
At a time in life where coaching is not important	50	42	34	42
Do not believe there is evidence that coaching works	16	14	15	15
Other	8	7	5	7
Base: Would not consider participation in a coaching relationship	1,399	3,689	1,002	6,090

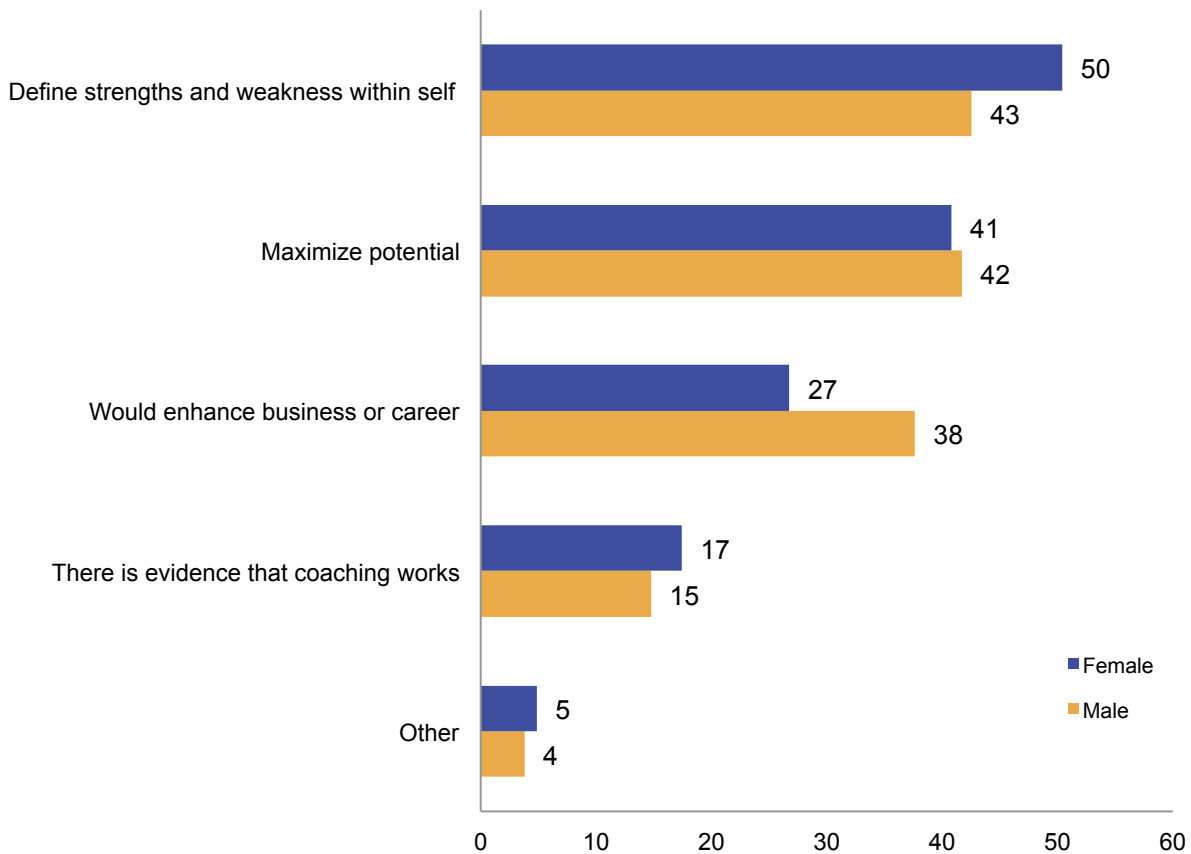
FIGURE 8: Why consider coaching?



Base: Unaware of coaching and would consider a coaching relationship (1,452).

Almost one in three (32%) said they believed coaching would enhance their business or career. Male respondents (38%) were more likely than females (27%) to identify business or career development as a reason for participating in a coaching relationship (Figure 9). Females were more likely to highlight defining their own strengths and weaknesses (50%) when compared with males (43%).

Figure 9: Why consider coaching, by gender



Base: Unaware of coaching and would consider a coaching relationship (1,452).

%

SECTION 4:

The Coaching Experience

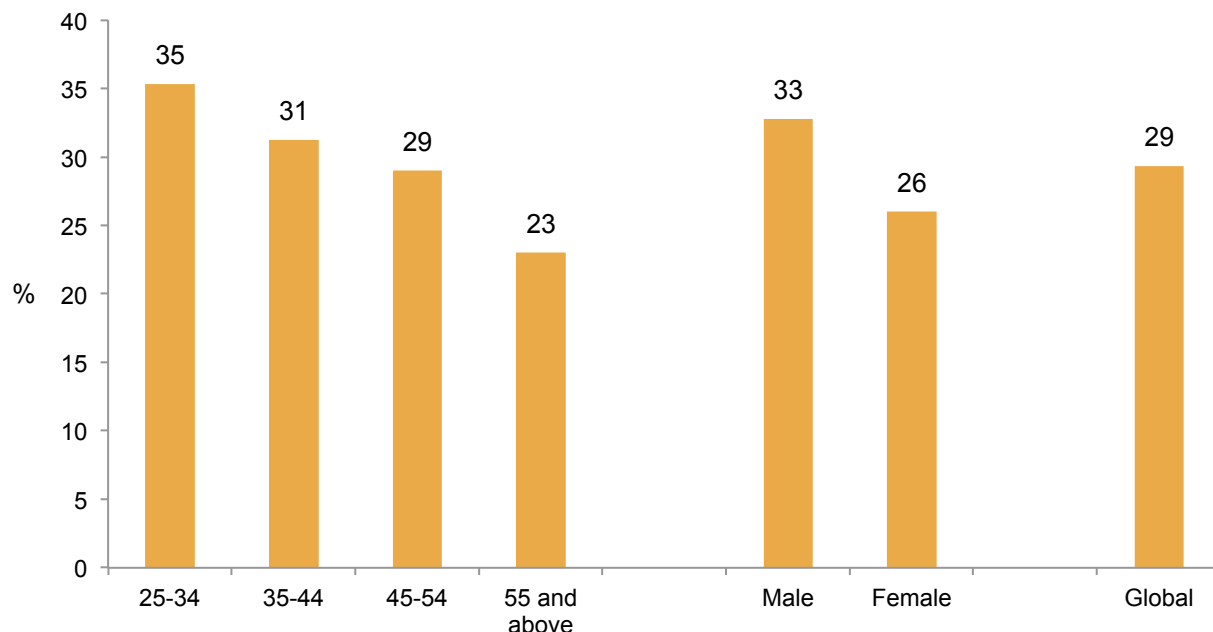


The Coaching Experience

Age and gender

The consumer survey findings indicate that, even among those who expressed an awareness of coaching, age continues to play a strong role in shaping the profile of participation rates. As illustrated in Figure 10, 35% of respondents aged 25-34 saying they are aware of coaching also said they had previously participated in a coaching relationship. By contrast, fewer than one in four (23%) of those aged 55+ who are aware of coaching said they had participated in a coaching relationship.

FIGURE 10: Participated in a Coaching Relationship, by age, gender (% of all aware of coaching)



Base: All respondents saying they are aware of coaching (11,176).

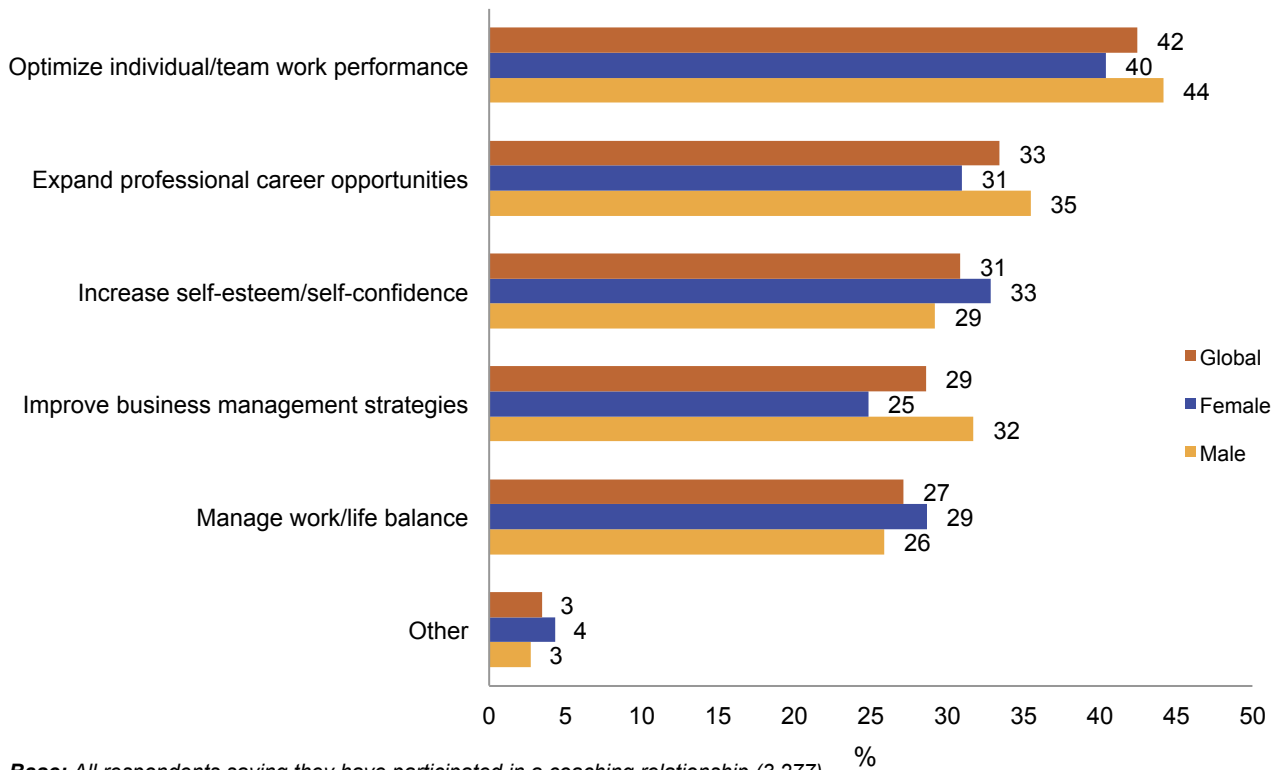
The relationship between participation and age is interesting to consider in light of the ongoing and worldwide trend toward the aging of the population; i.e., an increasing share of the population in the older age groups. Associated with that trend, it is likely that working lives will also extend in length. Against that context, the comparatively lower participation rate among those aged 55+ would therefore appear to be an opportunity for the coaching profession to increase demand for the services that it can provide.

The study findings also suggest that, among those with an awareness of coaching, males are more likely than females to participate in a coaching relationship (33% versus 26%).

Why participate in coaching?

When asked why they participated in a coaching relationship, the most frequently cited reasons were to optimize individual/team work performance (42%) followed by expand professional career opportunities (33%) and increase self-esteem/self-confidence (31%).

FIGURE 11: Why participate in a coaching relationship, by gender



Base: All respondents saying they have participated in a coaching relationship (3,277).

The differences between males and females in the proportions citing each of the reasons listed in Figure 11 are not large. But there is a clear pattern whereby male respondents tended to cite business-related reasons whereas female respondents were more likely to highlight personal development factors.

Certification/credential and membership of the coach

Survey respondents saying they had participated in a coaching relationship were asked to indicate if their coach held any specific certification/credential. They were also asked to indicate if their coach held membership to a professional organization.

Overall, just more than half (51%) of those who had participated in a coaching relationship recalled that their coach held a certification/credential (Table 5). A further 20% confirmed their coach did not have a certification/credential while 29% were unsure. At 39%, the proportion saying they were unsure was higher in relation to membership to a professional organization.

TABLE 5: Participants reporting their coach held certification/credentials and/or membership to a professional organization

	Certification/Credential	Membership
	%	%
Yes	51	36
No	20	25
Unsure	29	39
All	100	100

Base: Have been in a coaching relationship (3,277).

When compared with the 2010 findings on a like for like basis, the proportion saying their coach held a certification/credential increased by +6 percentage points. Mainly, this was due to a -7 percentage points reduction in the proportion saying they were unsure about whether their coach held a certification/credential.

Similarly, there was an -8 percentage points reduction in the proportion who were unsure of the membership status of their coach. This was reflected in an increase of +4 percentage points in the proportion saying their coach held membership to a professional organization and +2 percentage points saying their coach did not hold membership.

As all of the changes noted reflect moves out of the unsure category, it is difficult to know if the positive change in the proportion of respondents saying their coach held a certification/credential reflects an increase in the incidence of coaches with a certification/credential or a reduction in uncertainty, or some mix of the two. A similar observation can be made in relation to membership to a professional organization.

Nonetheless, when the 2013 certification/credential and membership findings are combined, a majority of respondents (58%) who participated in a coaching relationship confirmed that their coach had a certification/credential a professional membership or both. Only 14% said their coach held neither a certification/credential nor a membership. The remaining 28% were unsure.

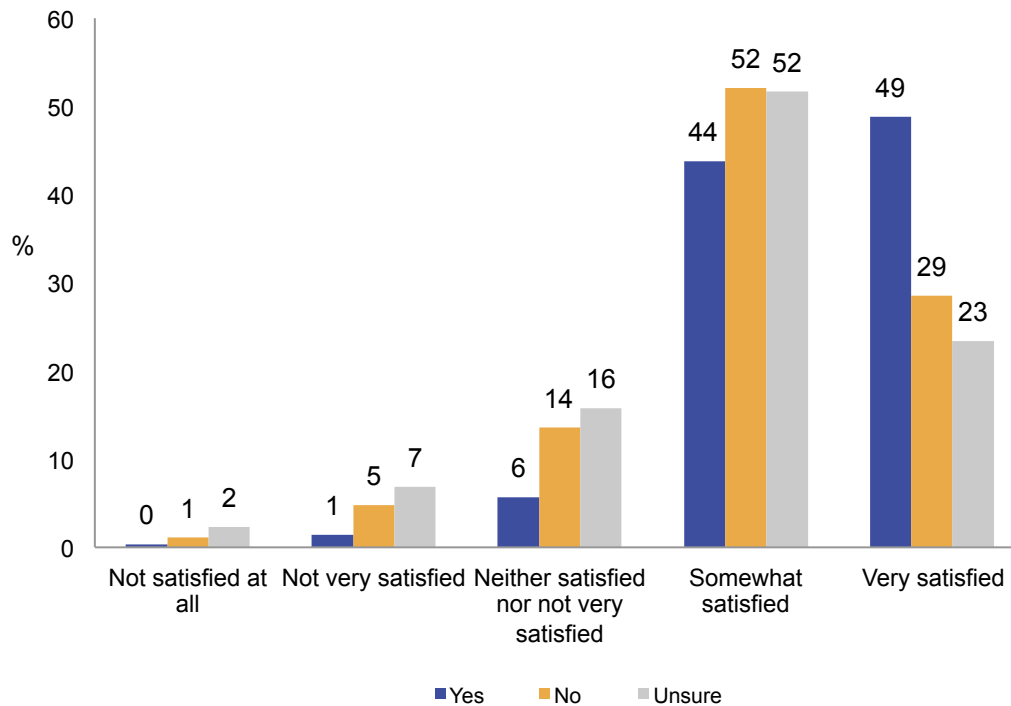
Satisfaction

When asked to indicate their level of satisfaction with their coaching experience, a large majority of respondents (85%) said they were very (37%) or somewhat (48%) satisfied.

Satisfaction levels varied sharply according to whether the respondent recalled that their coach had a certification/credential and/or membership.

Among those who recalled that their coach held any specific certification/credential, 93% expressed satisfaction. Indeed, within that group, respondents were more likely to say they were very satisfied (49%) than somewhat satisfied (44%) (Figure 12). By contrast, those who said their coach did *not* hold a certification/credential were significantly less likely to say they were very satisfied (29%). Those who were unsure about their coach's qualifications and membership status were least likely to say that they were very satisfied (23%).

FIGURE 12: Satisfaction by use of coach with certification/credential

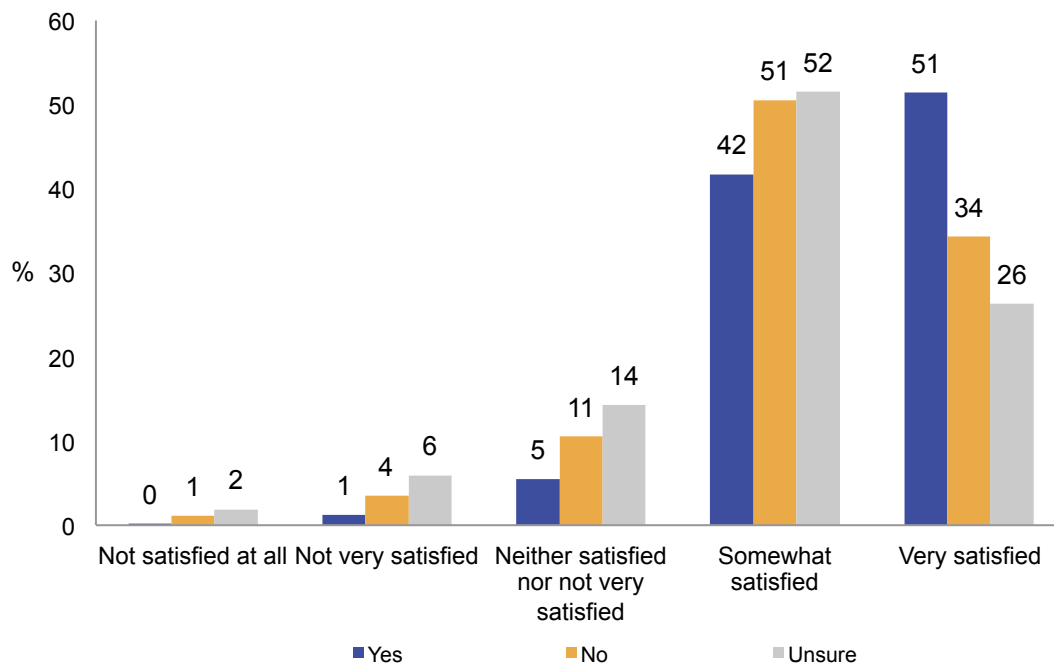


Base: All respondents saying they have participated in a coaching relationship (3,277).

A very similar picture emerges when satisfaction levels are analyzed by the use of a coach with membership to a professional organization. As can be seen from Figure 13, more than half (51%) of those saying their coach had such membership said they were very satisfied with their coaching experience. This compares with 34% of those saying their coach did not hold membership and 26% of respondents saying they were unsure about the membership status of their coach.

The message would seem to be clear: The coach who possesses professional qualifications and/or membership of a professional organization and possibly communicates those to the client is significantly more likely to receive a positive appraisal from the client.

FIGURE 13: Satisfaction by use of coach with membership to a coaching organization



Base: All respondents saying they have participated in a coaching relationship (3,277).

Likely to recommend

That message is further reinforced by examining the extent to which respondents would become coaching advocates to their colleagues, friends and/or family.

When asked to rate the likelihood of recommending coaching on a scale from 0 (extremely unlikely) to 10 (extremely likely), those who said their coach held a certification/credential were significantly more likely to say that they would recommend coaching compared to those who said their coach did not hold a certification/credential or who were unsure (Figure 14).

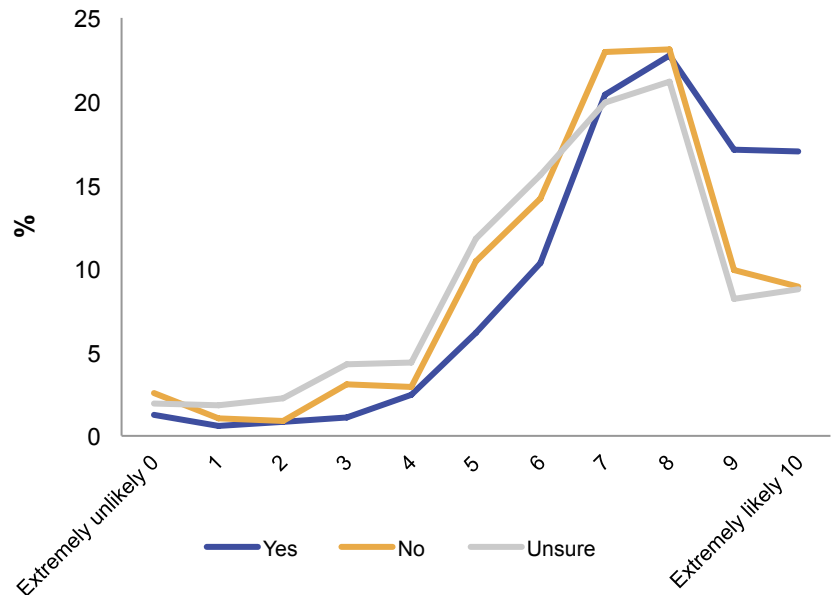
In particular, among those whose coach held a certification/credential, more than one in three (34%) rated their likelihood of recommending coaching in the range 9-10. This can be compared with 19% of those whose coach held no certification/credential and 17% of those who were unsure about their coach's qualifications.

The mean score for those whose coach held a certification/credential was 7.57, compared to 6.85 for those whose coach did not hold a certification/credential and 6.59 for those who were unsure.

Similarly, respondents saying that their coach held membership to a professional organization gave significantly higher scores than those whose coach did not hold membership or who were unsure (Figure 15). Thus, among those whose coach held membership to a professional organization, 36% rated their likelihood of recommending coaching in the range 9-10. This can be compared with 23% of those whose coach held no certification/credential and 19% of those who were unsure about their coach's qualifications.

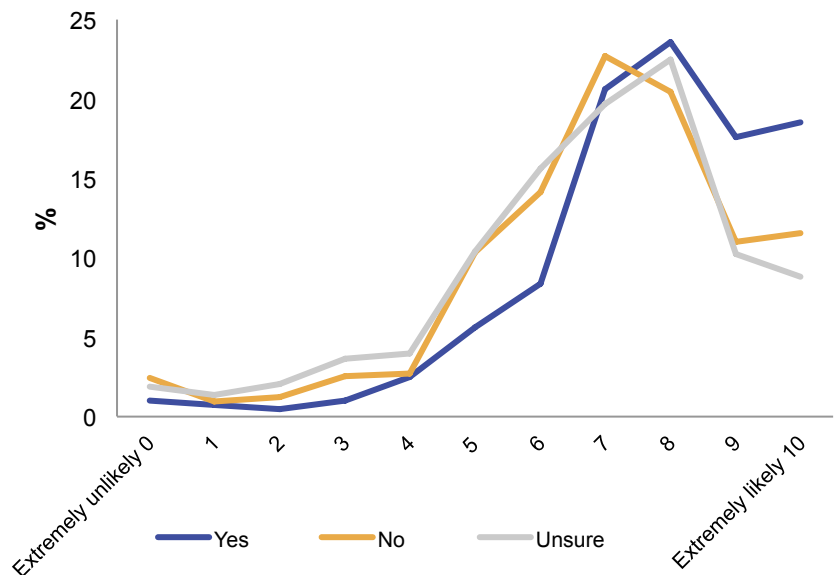
The mean score for those whose coach held membership to a professional organization was 7.70, compared to 6.95 for those whose coach did not hold a certification/credential and 6.75 for those who were unsure.

FIGURE 14: How likely to recommend coaching by use of coach with certification/credentials



Base: All respondents saying they have participated in a coaching relationship and how likely to recommend coaching (3,018).

FIGURE 15: How likely to recommend coaching by use of coach with membership to an organization



Base: All respondents saying they have participated in a coaching relationship and how likely to recommend coaching (3,018).

SECTION 5:

Perspectives on Coaching



Perspectives on Coaching

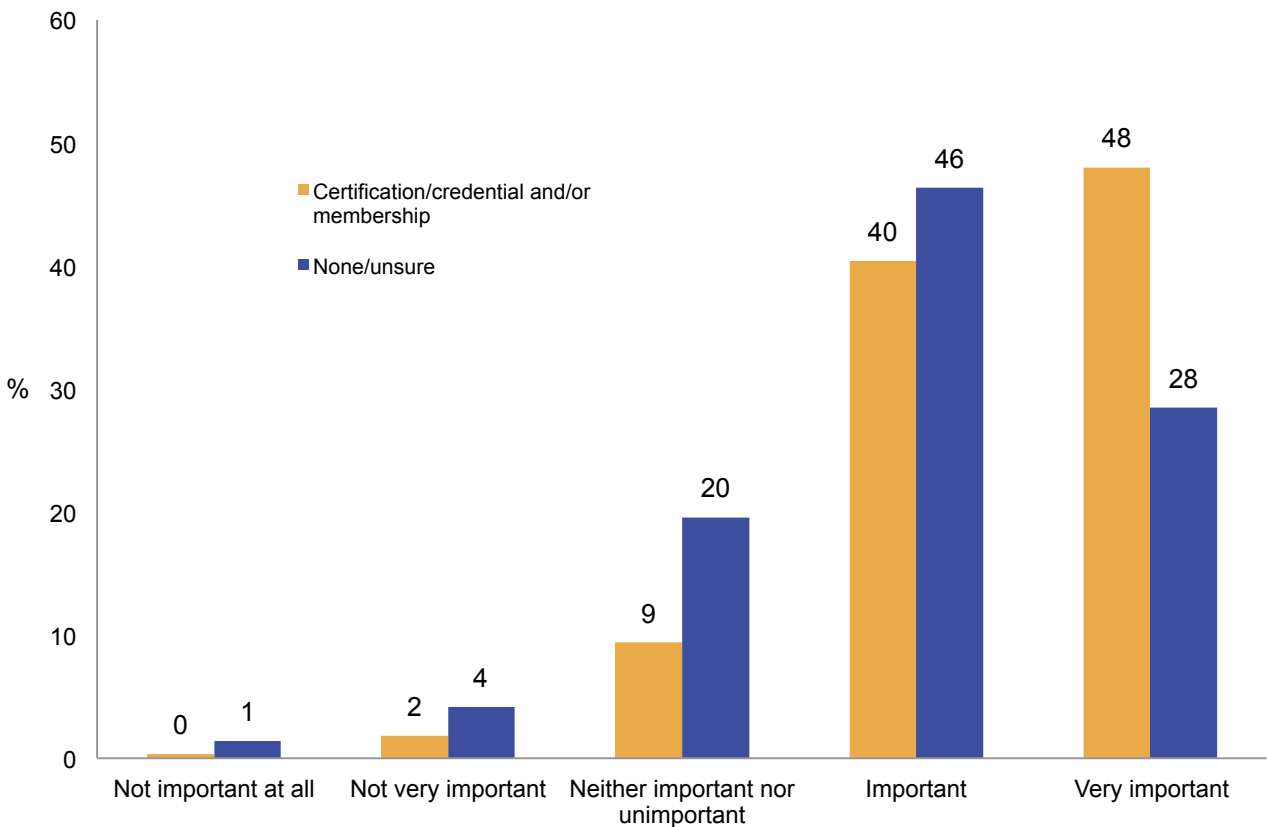
The importance of credentials

Reflecting the findings in relation to satisfaction and advocacy for coaching, almost one in two (48%) of those whose coach held a certification/credential and/or membership said it was very important that a coach should have a recognized qualification (Figure 16). A further 40% said it was important to hold a certificate/credential (i.e., 88% overall when combined with the proportion saying it was very important).

By contrast, 28% of those who said their coach did not possess a certification and/or membership, or who were unsure, said that having a certificate/credential was very important. Almost half of those respondents (46%) said it was important that their coach should hold a certification/credential (i.e., 74% overall).

Among all those who have been in a coaching relationship, 83% said it was important or very important that their coach should have appropriate certification/credentials (Figure 17). A similar proportion (81%) of those who are aware of coaching but have not yet participated also pointed to the importance of certification/credentials.

FIGURE 16: Importance of coach having a certification/credential

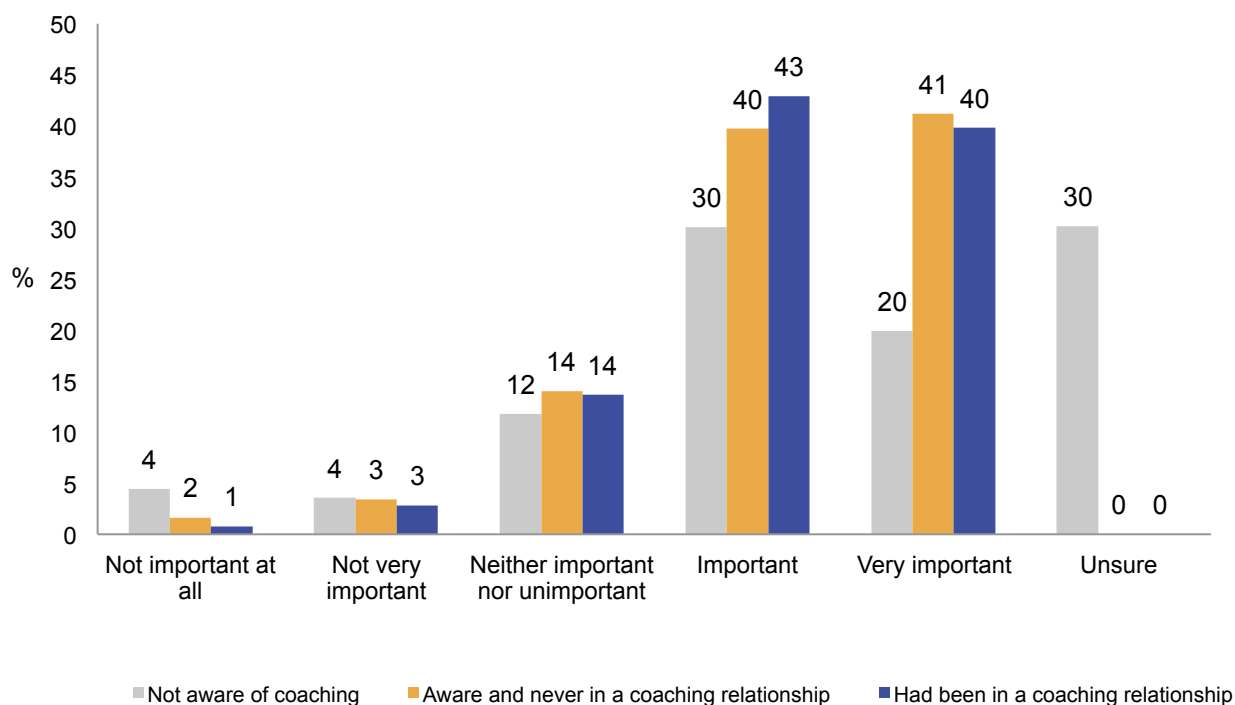


Base: All respondents saying they have participated in a coaching relationship (3,277).

Not surprisingly, a substantial proportion of those who said they were unaware of coaching (30%) were unsure of the importance of the coach having a certification/credential. Nonetheless, one in two such respondents (50%) said it was important (30%) or very important (20%) that the coach should have a certification or credential.

Overall, while there are variations in the importance attributed to coaching certifications/credentials, the overall picture remains broadly unchanged from 2010 (i.e. the importance of professional qualifications from the consumer's perspective).

FIGURE 17: Importance of coach having a certification/credential



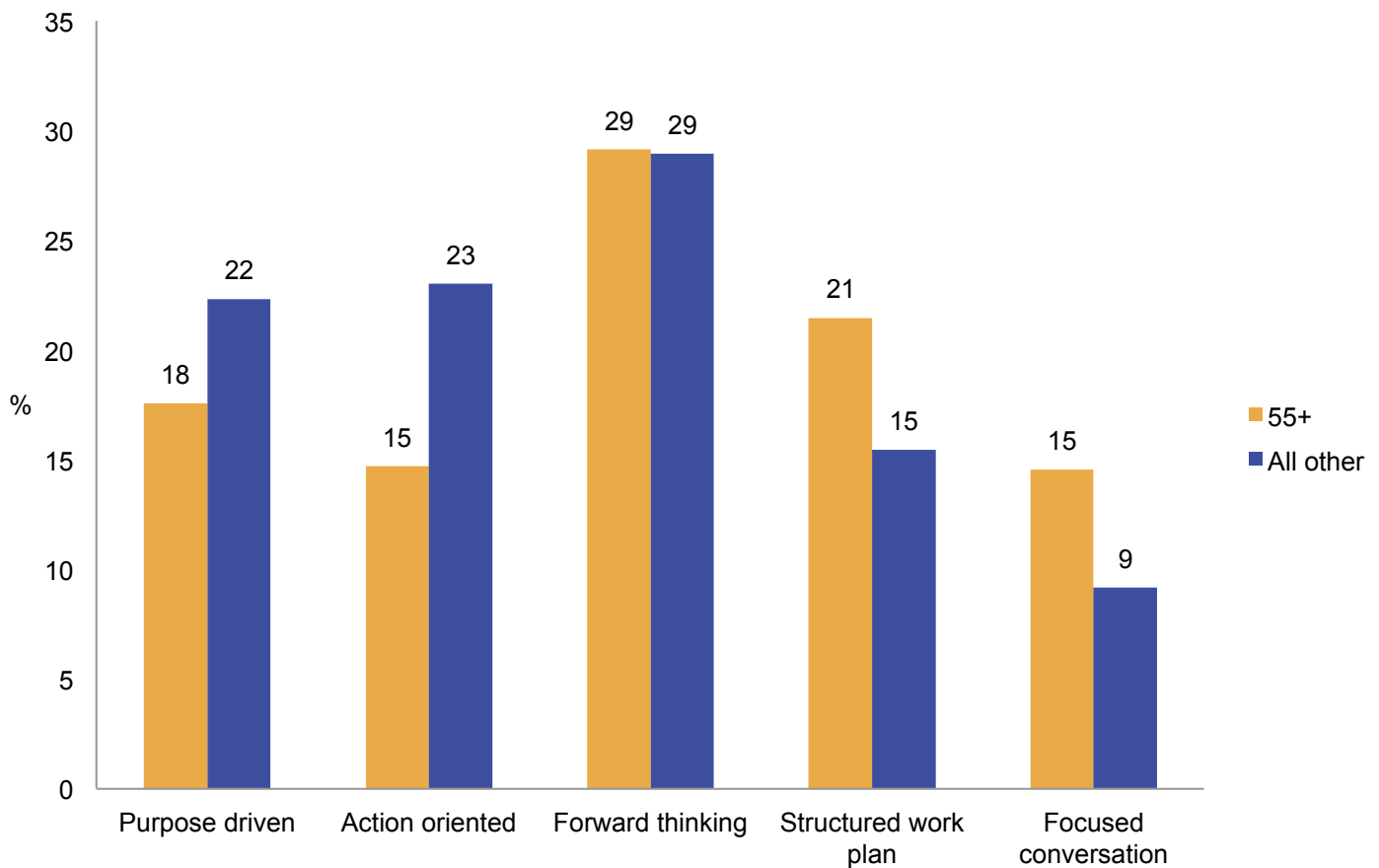
Base: All respondents (18,810).

How to describe coaching

To elicit views on coaching, survey respondents who had been in a coaching relationship were provided with a list of statements and asked to select the statement they felt would best describe coaching. The results are shown in Figure 18, distinguishing between those aged 55+ and all younger age groups combined.

The age groups were in agreement on the statement most frequently selected to best describe coaching (i.e., forward-thinking), chosen by 29%. Beyond that, the age groups diverged somewhat in their views on coaching. Those aged 55+ were more likely to mention structured work plans and focused conversation compared to all other age groups. By contrast, the younger age groups were more likely to describe coaching as purpose-driven or action-oriented. The 55+ age group would appear to give more emphasis to a process-oriented view on coaching whereas the younger age groups tend to take a somewhat more outcome-oriented perspective.

FIGURE 18: How to best describe coaching to someone



Base: All respondents saying they have participated in a coaching relationship (3,277).

SECTION 6:
Key Points Summary



Key Points Summary

- Overall, 58% of respondents said they were aware of professional business and/or life coaching, including 17% saying they were “very aware” and 41% describing themselves as “somewhat aware.”
- Awareness levels varied strongly by age group, ranging from 67% among those aged 25-34 to 48% of those aged 55+.
- Notwithstanding the difficult economic climate in recent years, the global awareness level rose by +8 percentage points between 2010 and 2013, ranging from +5 in the Big Four countries to +9 in the continental Europe.
- Almost one in five respondents (17%) said they had participated in a coaching relationship. Between 2010 and 2013, it is estimated that participation in coaching increased by +1 percentage point.
- One in three (33%) of those who had not yet participated in coaching said they would consider participation in a coaching relationship as the person being coached. The proportion varied sharply between those who are aware of coaching (47% would consider receiving coaching) and those who are unaware (19%).
- The possibility of entering a coaching relationship also varied strongly by age group, ranging from 44% of those aged 25-34 to 21% of respondents aged 55+.
- When asked why they would not consider a coaching relationship, 42% of respondents felt they were at a time in their lives where coaching is not important. The prominence of time in life was strongly age-related, as 54% of those aged 55+ cited that factor as a reason for not considering coaching. In the younger age groups, affordability and a perceived absence of need were more likely to be identified as reasons for not considering coaching.
- Among those who would consider coaching, the most frequently cited motivations were defining their own strengths and weaknesses (47%), followed by a desire to maximize their own potential (41%).
- Reflecting the patterns in awareness and consideration of coaching, participation in a coaching relationship was also strongly age-related. Among those who are aware of coaching, 35% of those aged 25-34 said they had participated in a coaching relationship, falling to 23% of those aged 55+.
- Male respondents tended to cite business-related reasons, such as optimizing work performance, whereas female respondents were more likely to mention personal development factors.
- Among those who had participated in a coaching relationship, slightly more than half (51%) said their coach possessed a certification/credential while 36% said their coach was a member of a professional organization.
- Satisfaction with the coaching experience was significantly higher among those whose coach held a certification/credential and also among those whose coach held membership to a coaching organization.
- Similarly, the likelihood of recommending the coaching experience to colleagues, friends and/or family was significantly higher among those whose coach held a certification/credential and/or membership to a coaching organization.
- The importance of certification/credentials from the consumer’s perspective was strongly voiced by survey respondents. Among those who had been in a coaching relationship, 83% said it was important or very important that the coach should have a certification/credential.

SECTION 7:
Emerging Themes



Emerging Themes

The demographic factor in the market for coaching services.

The study results show that age is an important predictor of consumer awareness of and participation in coaching, including both take-up of coaching services and the likelihood of considering a coaching relationship. In general, those in the older age groups exhibit lower levels of both awareness and participation. Increasing the demand for coaching services among the older age groups is both an opportunity and a challenge. Population aging is a global phenomenon, but people will be retiring later and seeking to extend their working lives. This presents opportunities for coaches to help people seeking to make transitions in their working lives and to sustain and lengthen their careers. The challenge lies in overcoming the perception, most prevalent among people aged 55+, that they are at a time in their lives where coaching is not seen as important.

Geographic contrasts in the market for coaching services.

Between 2010 and 2013, awareness of coaching rose fastest in the emerging nations outside of continental Europe and the Big Four. In those countries, with their younger age profiles, economic growth will provide opportunities for coaches. The challenge lies in translating rising awareness into increasing participation. In the Big Four and continental Europe, population aging is more advanced and this will present its own challenges and opportunities.

The importance of holding a certification/credential.

The study findings show that satisfaction levels tend to be higher for coaches who possess a certification/credential. This might suggest that coaches with a certification/credential are able to obtain better outcomes for their clients, who are then more likely to recommend or advocate coaching services to their colleagues, friends and/or family. Obtaining such recommendations presents a clear opportunity to widen the network of potential clients for coaching services.

Building awareness.

Among those who have not yet participated in coaching, the likelihood of considering a coaching relationship was significantly higher among survey respondents who are very or somewhat aware of coaching. This emphasizes the importance of building awareness of coaching in seeking to attract new customers.

Increasing participation.

The study findings point to factors that can help to trigger participation in a coaching relationship as well as reasons why consumers may not currently consider participation in coaching. The limiting factors vary by age group. Young people are more likely to say they do not need coaching while the older age groups are more likely to point to their time in life as a factor inhibiting their participation in coaching. The challenge for coaches is to address these perceptions regarding the relevance of coaching as perceived by consumers who do not currently avail themselves of coaching services.

For more information about the *2014 ICF Global Consumer Awareness Study*, visit
Coachfederation.org/consumerstudy2014.

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