COVID-19

AND THE

COACHING INDUSTRY

2020 ICF GLOBAL COACHING STUDY

COVID-19 AND THE COACHING INDUSTRY

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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.*

INTRODUCTION

This report presents the findings from *COVID-19 and the Coaching Industry*, a study conducted in mid-2020 to assess the impact of the COVID-19 pandemic on the coaching community. The study was commissioned by the International Coaching Federation (ICF) and undertaken by PricewaterhouseCoopers (PwC).

Founded in 1995, ICF is dedicated to advancing the coaching profession by setting high ethical standards, providing independent certification and building a worldwide network of credentialed coaches. ICF is a global organization, with a membership comprising more than 35,000 trained personal and business coaches located in more than 140 countries and territories.

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

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

The *2020 Global Coaching Study* has enormous relevance as a benchmark: It is the last and best possible snapshot of the coaching industry, pre-pandemic. However, it is no longer a current snapshot. It is a picture of **what was**. To better understand **what is**, ICF commissioned PwC to conduct this snapshot survey designed to assess the impact of the pandemic on the coaching industry worldwide.

The survey was open to professional coach practitioners and to managers and leaders who use coaching skills in their roles. This report presents only the findings regarding coach practitioners. A separate document will be issued to present the findings for managers and leaders who use coaching skills in their roles.

Objectives

The goal of the survey was to collect up-to-date information on the state of the coaching industry worldwide, enabling comparison with the findings published in the *2020 ICF Global Coaching Study*.

The objectives of the survey were to identify:

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

Questionnaire Design

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

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

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

Survey Process

The survey was open online from June 16–July 15, 2020. The questionnaire was available in nine languages: English, French, German, Italian, Japanese, Korean, Simplified Chinese, Portuguese and Spanish.

Survey participation was sought across three streams:

- Respondents to the *2019 Global Coaching Survey* who had given their consent to participate in a further global coaching study.
- The set of individuals who had been invited to participate in the *2019 Global Coaching Survey* but who did not ultimately provide a response.
- New members to join ICF from December 2 – June 10.
- Visitors to an open registration website.

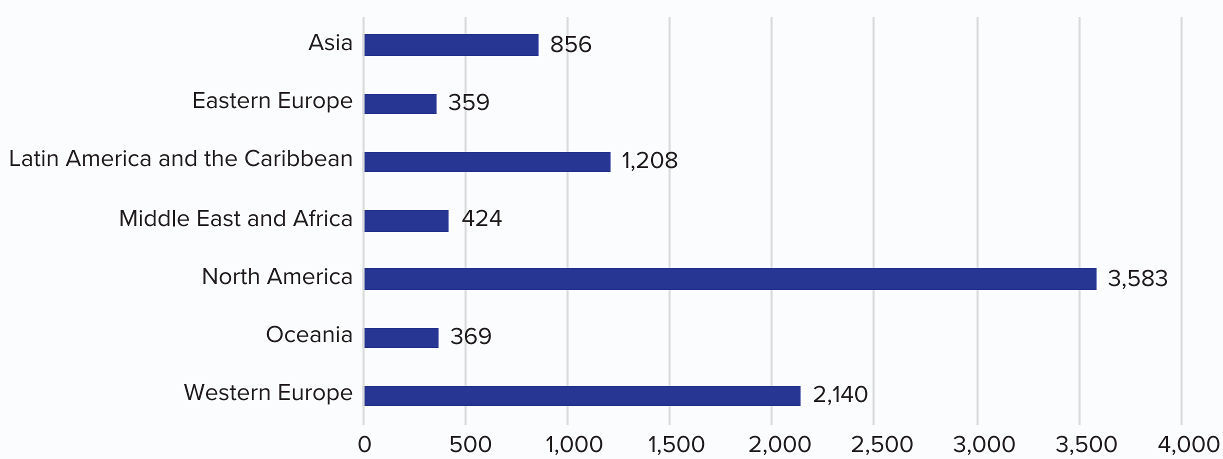
The first two streams were issued with individual personalized links to the online survey. To encourage wider participation via the open registration website, respondents in the first two streams were asked to send a generic link on to their wider networks of coaches; with the intention of initiating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

Survey Outcomes

Reflecting the relevance of the topic, a large and truly global number of surveys were completed. In total, 10,028 survey responses were received, from 140 countries and territories across the seven world regions. Of those, 8,939 surveys were completed by the coach practitioners who are the focus of this report.

The largest number of coach practitioner responses was received from North America (3,583), followed by Western Europe (2,140) and Latin America and the Caribbean (1,208).

Survey responses by region: Coach practitioners



Structure of the Report

The remainder of this report is organized as follows.

Section 2 reports on the direct impacts of the pandemic on coach practitioners, including income and employment effects and changes to the number of clients, hours spent coaching and income/revenue from coaching.

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

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

SECTION 2: IMPACTS

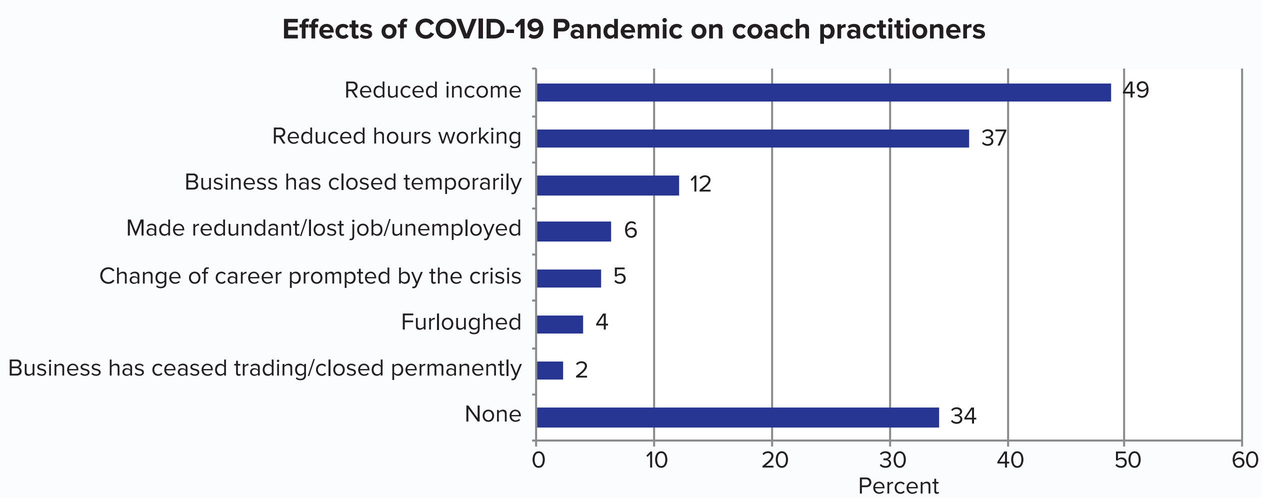
Introduction

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

- Income and employment changes
- Overall impact on coaching practice
- Changes to number of clients, hours spent coaching and revenue

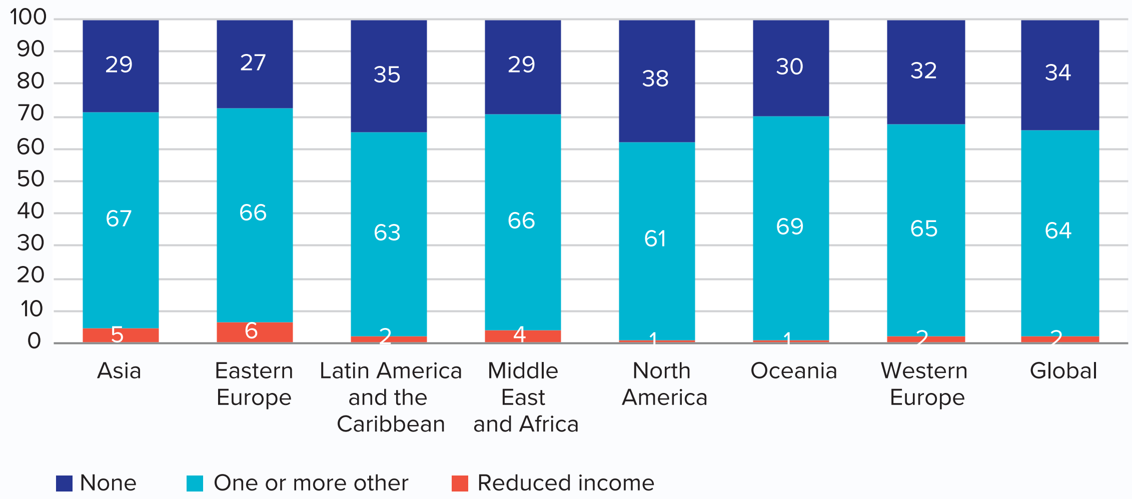
Income and Employment

Coach practitioners have been widely affected by the pandemic. Almost one in two (49%) said they had experienced reduced income while 37% said their hours had been reduced. Just one in three coach practitioners (34%) said they had not experienced adverse effects from the pandemic on their income and employment.



Many coach practitioners experienced some combination of income and employment effects. For example, almost three in four coaches (74%) who said their working hours had been reduced also reported a reduction in income. Among those saying their business had closed temporarily, 63% also said their income had reduced.

The effects of the pandemic were felt across all seven world regions. The proportion reporting one or more income and employment effects ranged from 71% in Asia and the Middle East and Africa to 62% in North America.



Reduced income was most frequently reported across all regions except Latin America and the Caribbean.

The mix of employment effects varied across the regions. Temporary business closures were reported by around one in five coaches in the emerging regions of Asia (21%), Eastern Europe (23%), the Middle East and Africa (20%) and Latin America and the Caribbean (19%).

The proportion reporting no income and employment effects was highest in North America (38%) and Latin America and the Caribbean (35%).

Generations by Year

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

Further illustrating the widespread impact of the pandemic, income and employment effects did not vary greatly with factors such as the age of the coach. In both the Generation X and Baby Boomer demographic, 66% of coach practitioners said they had experienced one or more income and employment effects. Nearly two-thirds (62%) of Millennials said they had experienced one or more effects. Reduced income was the main effect across each age group, from 45% of Millennials to 50% of Baby Boomers. One point of note is that Millennials were more likely to say that the crisis had prompted a change of career; 8% compared with 4% of Baby Boomers and 6% in Generation X.

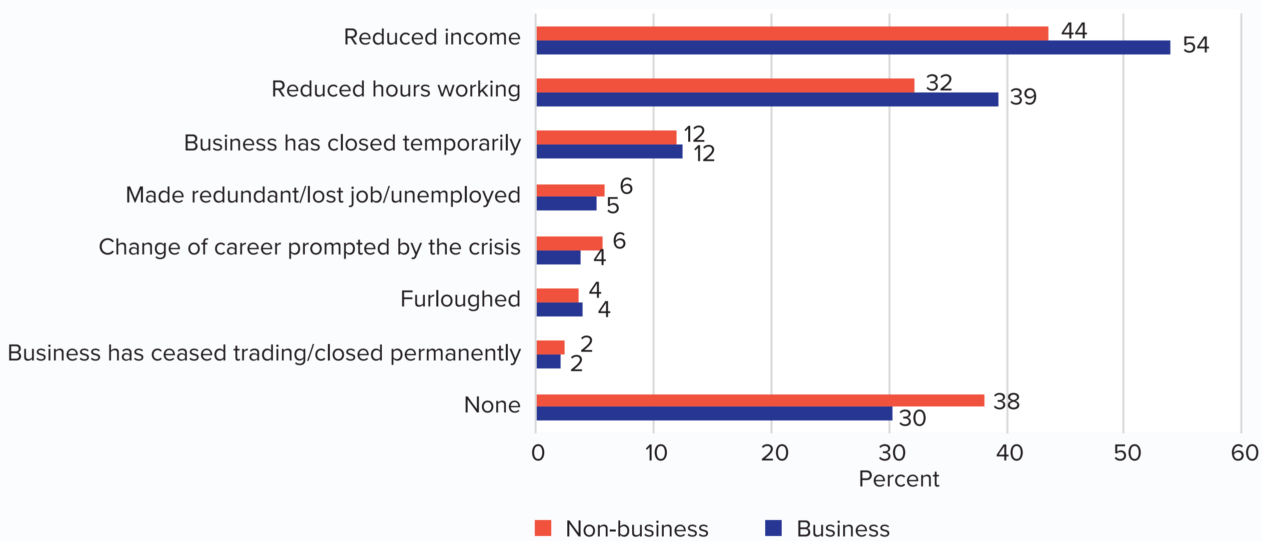
NOTE: *Whereas other regions included in the research had been grappling with the economic impacts of the pandemic and associated mitigation measures for several months when the survey launched, this was not the case for many countries and territories in Latin America and the Caribbean. COVID-19 cases in Latin America and the Caribbean surged in early June 2020, just before this survey launched.*

Income and employment changes by region

	Asia	Eastern Europe	Latin America and the Caribbean	Middle East and Africa	North America	Oceania	Western Europe	Global
Reduced income	60	58	30	51	51	59	47	47
Reduced hours working	31	39	39	34	37	40	37	35
Business has closed temporarily	21	23	19	20	6	6	13	12
Made redundant/ lost job/unemployed	8	10	7	8	6	4	5	7
Change of career prompted by the crisis	9	11	7	6	4	5	5	6
Furloughed	4	3	4	5	3	3	6	4
Business has ceased trading/ closed permanently	5	6	2	4	1	1	2	2
None	29	27	35	29	38	30	32	36

On average, the effects of the pandemic were felt more widely by coach practitioners with a Business Coaching (i.e., Leadership Coaching, Executive Coaching, Business/Organization Coaching or Small Business Coaching) specialty compared to those with a non-business specialty. Mainly, that was due to the higher proportions of coach practitioners with a Business Coaching specialty reporting lost income (54% versus 44% of non-Business Coach practitioners). Across the main coaching specialties, the majority of coach practitioners felt one or more effects from the pandemic (70% of Business Coach practitioners and 62% of non-business coach practitioners).

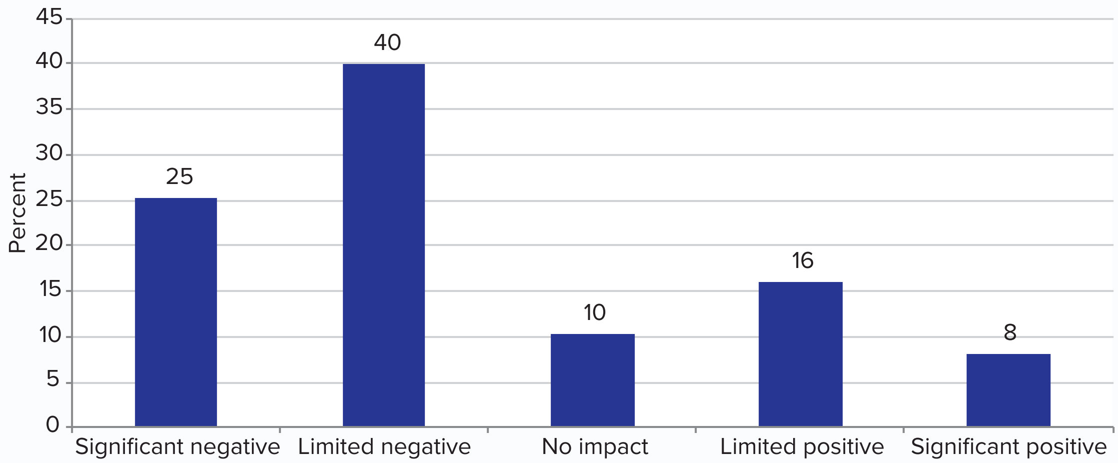
Effects of COVID-19 pandemic by main area of coaching



Overall impact

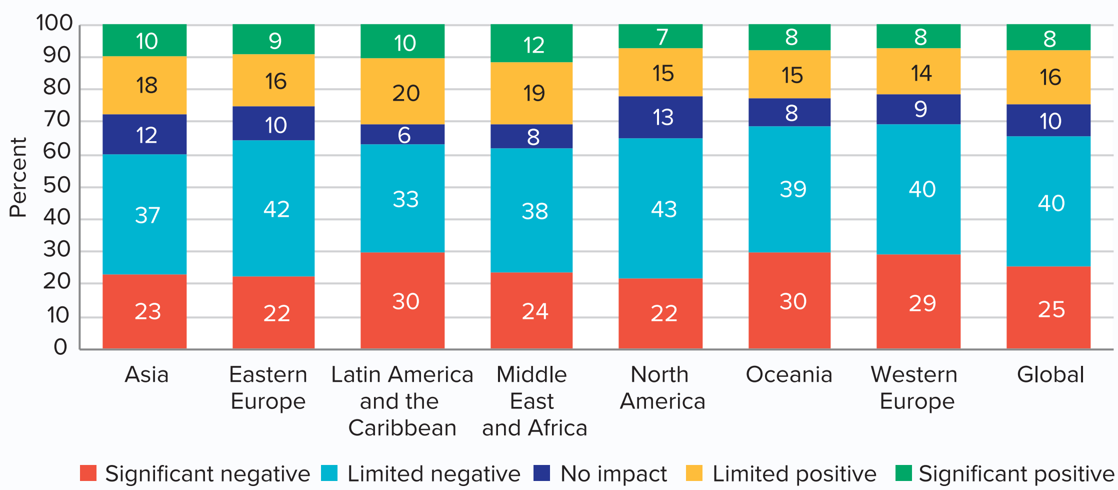
When asked about the overall impact of the pandemic on their coaching practice/business/responsibilities, 25% said they had experienced a significant negative impact with a further 40% reporting a limited negative impact. Only one in 10 said there had been no impact from the pandemic on their coaching practice. Almost one in four coach practitioners (24%), reported that the pandemic had a positive impact.

Overall impact on coaching practice/business/responsibilities

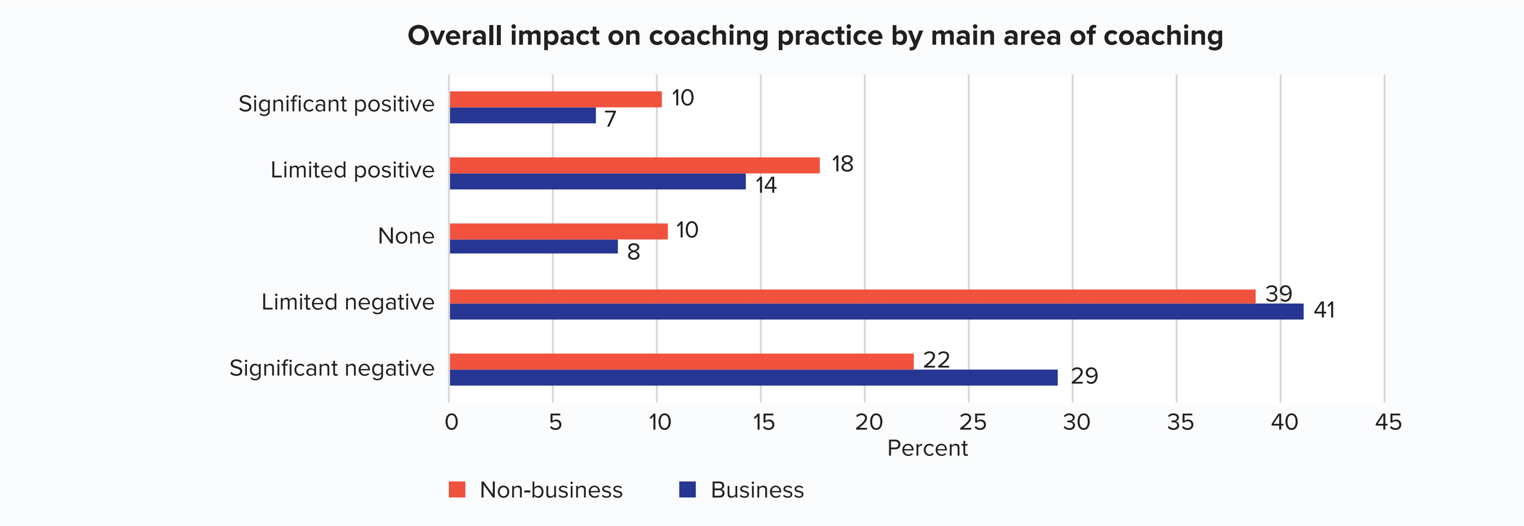


The proportion reporting a significant negative impact ranged from 22% in Eastern Europe and North America to 30% in Latin America and the Caribbean.

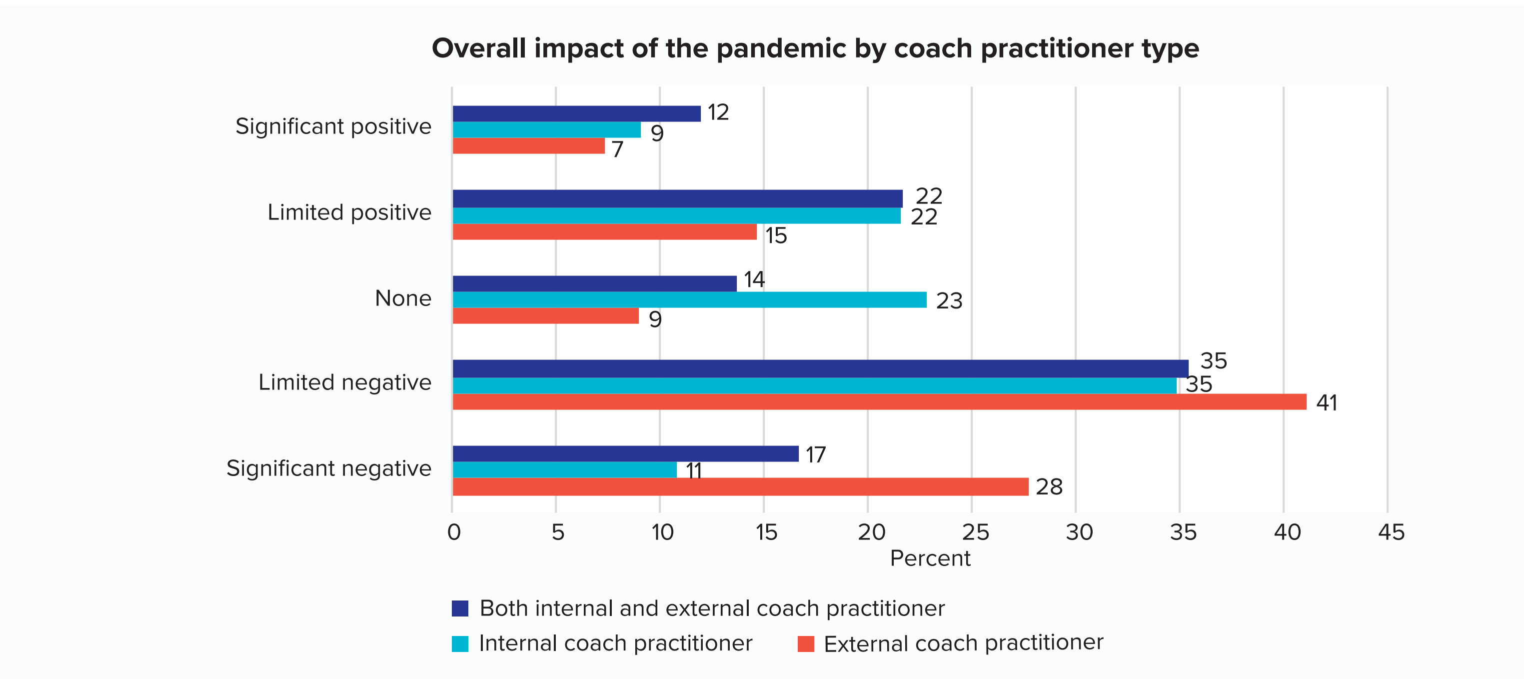
Overall impact on coaching practice/business/responsibilities



Reflecting the contrasts in income and employment effects, coach practitioners with a business specialty were more likely to report a significant negative effect (29% compared to 22% with a non-business specialty). Conversely, positive impacts were more likely to be cited by coach practitioners with a non-business specialty.

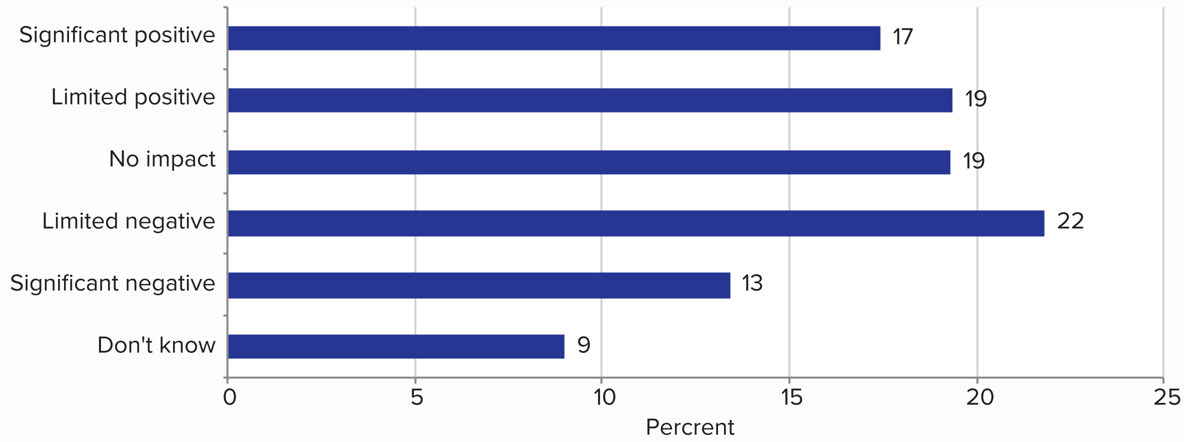


Significant negative effects were more strongly felt by external coach practitioners (28%) compared with internal coach practitioners (11%) and those who coach both internally and externally (17%).



Internal coach practitioners and those who coach both internally and externally were asked about the impact of the pandemic on the use of coaching within their organization. In contrast to the overall impacts on individual coach practitioners, the organizational impacts were considerably more balanced, with respondents almost equally likely to report either positive impacts (36%) or negative impacts (35%).

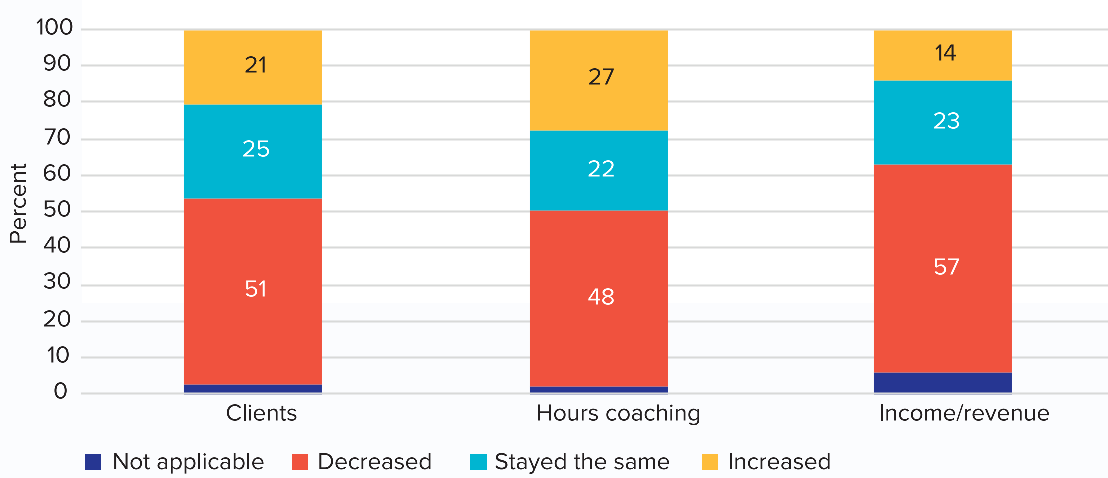
Overall impact on the organization: Internal coach practitioners and internal/external coach practitioners only



Clients, hours and income/revenue

Since the beginning of the pandemic, 51% of coach practitioners have experienced a decrease in their number of active clients. A similar proportion (48%) have seen a reduction in their hours coaching while 57% of coach practitioners have suffered reduced income/revenue from coaching since the pandemic started.

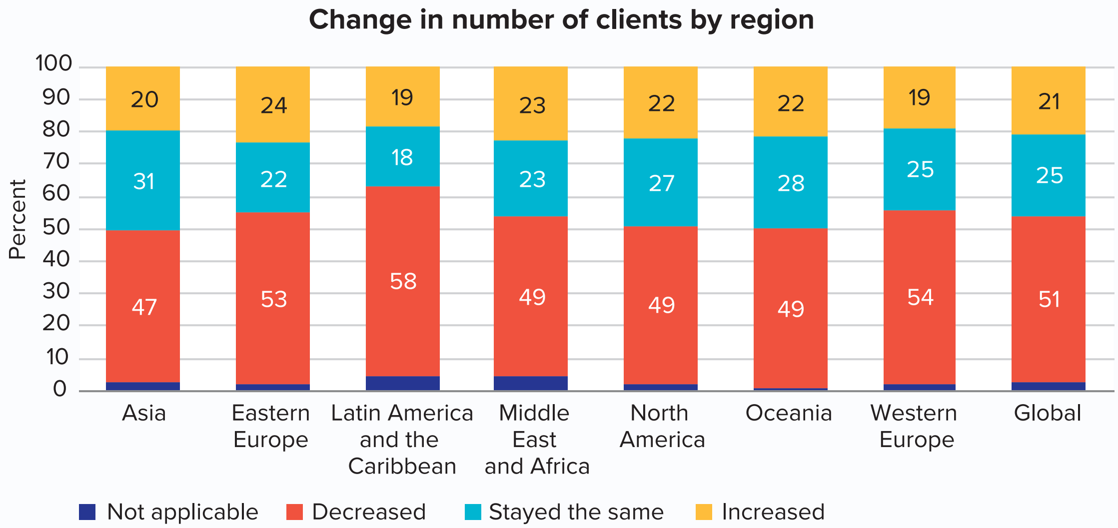
Changes since the pandemic started



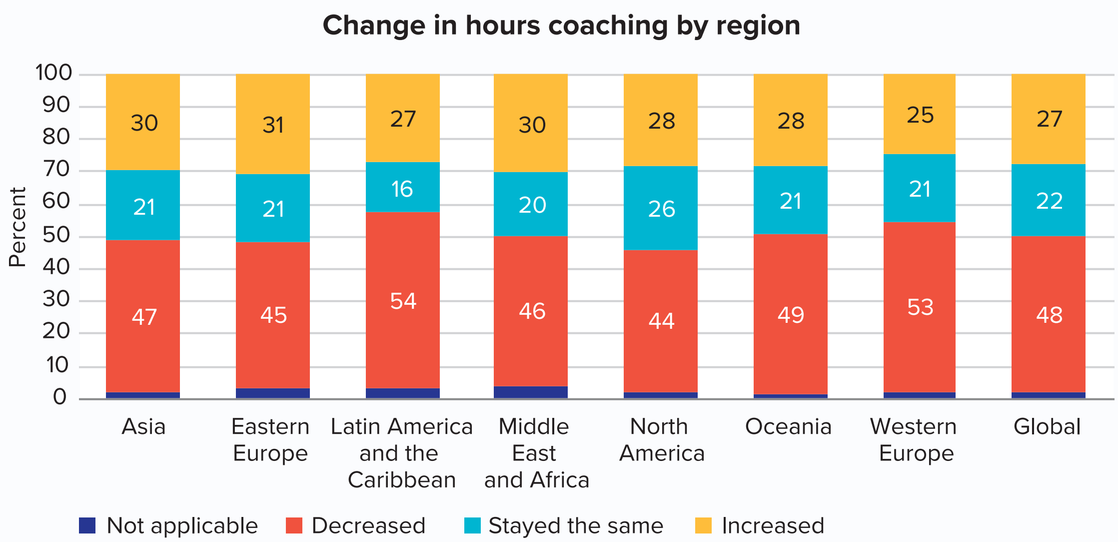
For a small percentage of coach practitioners, the pandemic has been positive in terms of clients, hours and income/revenue. The positive effects have been more pronounced in terms of clients (21% with an increase) and hours working as a coach (27% with an increase) than on the income/revenue side (14% with an increase).

Across all three indicators, the pattern of change by region has broadly mirrored the overall position, i.e., larger proportions of coach practitioners saying clients, hours and/or income/revenue have decreased rather than increased.

Across the seven world regions, the proportion saying the number of clients decreased ranged from 47% in Asia to 58% in Latin America and the Caribbean. In each region, about one in five coach practitioners said client numbers had increased, from 19% in Latin America and the Caribbean to 24% in Eastern Europe.

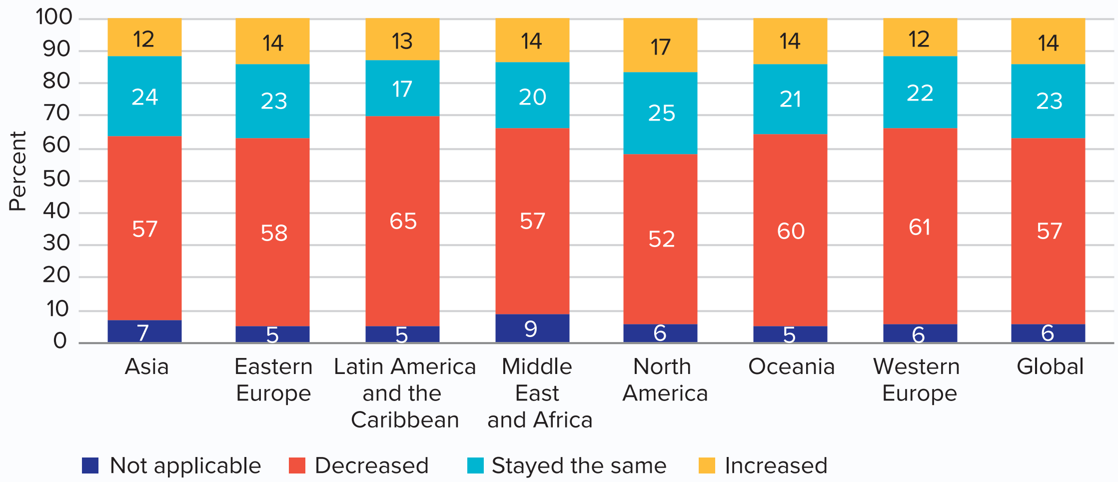


The picture was very similar in respect of hours worked. Decrease in hours worked since the pandemic began ranged from 54% in Latin America and the Caribbean to 44% in North America. The proportions reporting an increase in hours working as a coach practitioner was slightly higher than for clients, albeit still within a fairly narrow range from 25% in Western Europe to 31% in Latin America and the Caribbean.



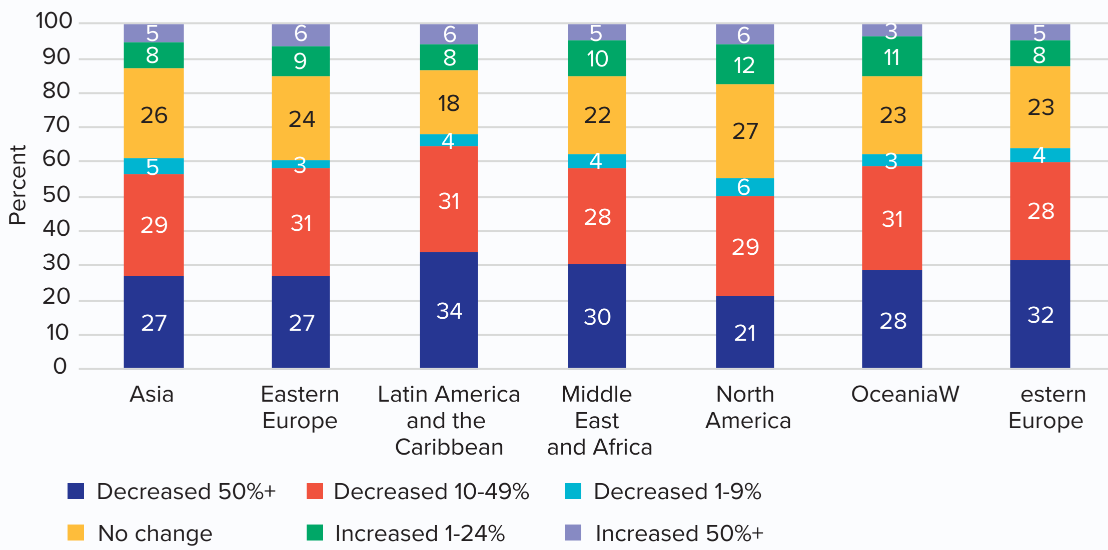
Similar to the global picture, across each of the world regions, the majority of coach practitioners said they had experienced a decrease in income/revenue since the pandemic started, from 52% in North America to 65% in Latin America and the Caribbean. Relatively few coach practitioners said income/revenue had increased (ranging from 12% in Asia to 17% in North America).

Change in income/revenue from coaching by region



Across the world regions, the proportion estimating a decrease of 10% or more varied from 50% in North America 65% in Latin America and the Caribbean.

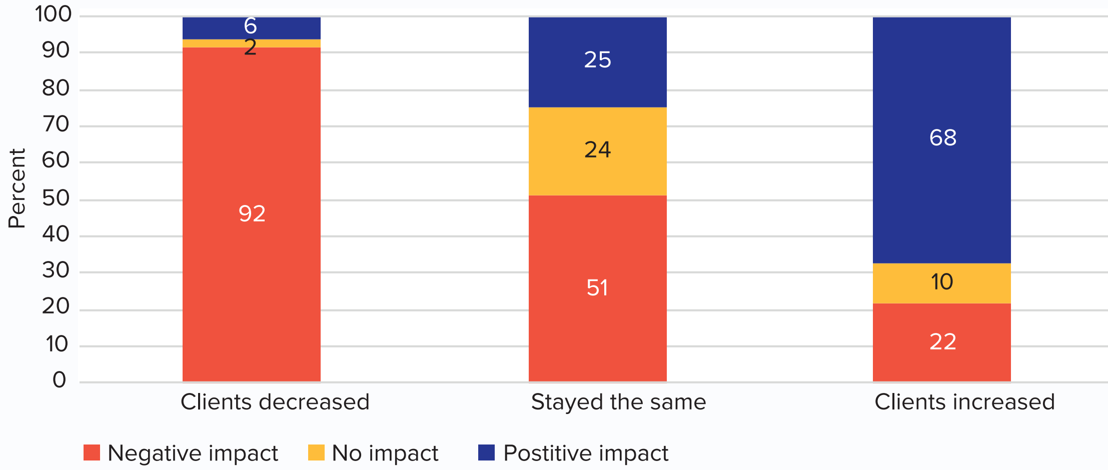
Change in income/revenue since pandemic started by region



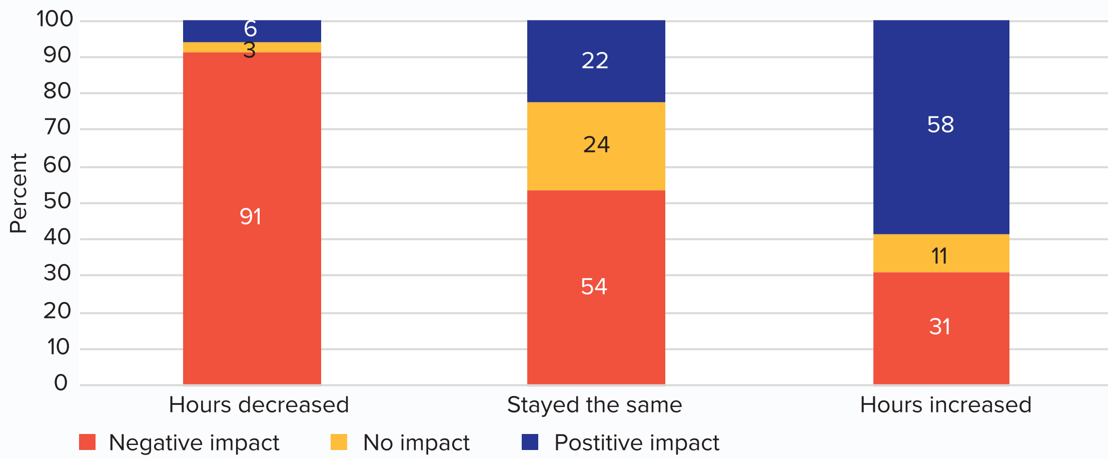
Clients and hours coaching are the main drivers of income/revenue from coaching. Hence, the three impact indicators are inter-linked. For example, 93% of coaches with a decrease in their client numbers and 91% of those working fewer hours also reported a decline in income/revenue from coaching.

Among coach practitioners who said that the number of clients coached had decreased, 92% said the overall impact had been negative. Conversely, two in three of those who said they had increased their client numbers reported a positive overall impact of the pandemic.

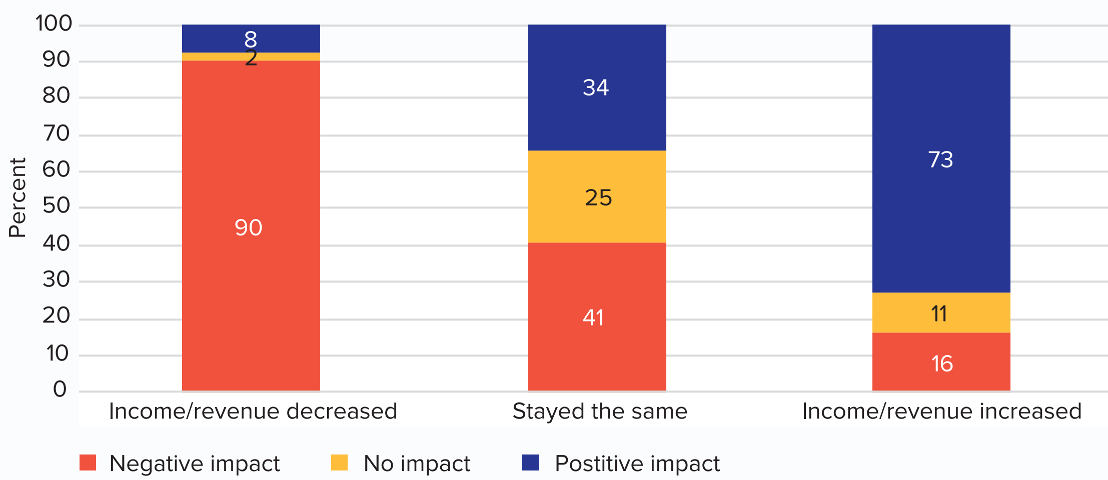
Change in clients coached and overall impact of the pandemic



Change in hours working as a coach and overall impact of the pandemic



Change in income/revenue from coaching and overall impact of the pandemic



SECTION 3

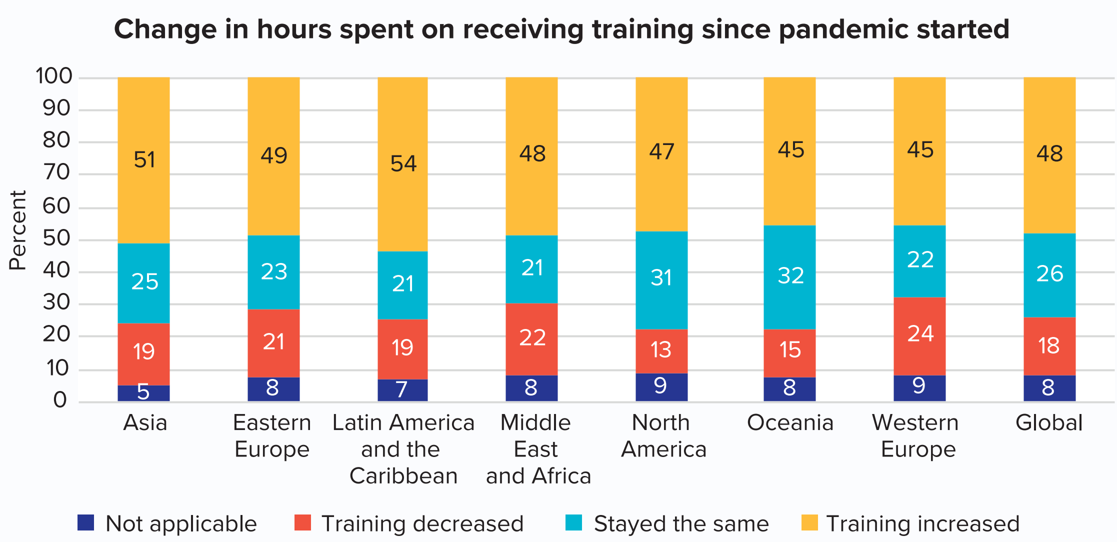
Introduction

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

- Receipt of training
- Service offering
- Primary and sponsored clients
- Methods used to coach clients
- Coaching technology
- Pro bono coaching

Training

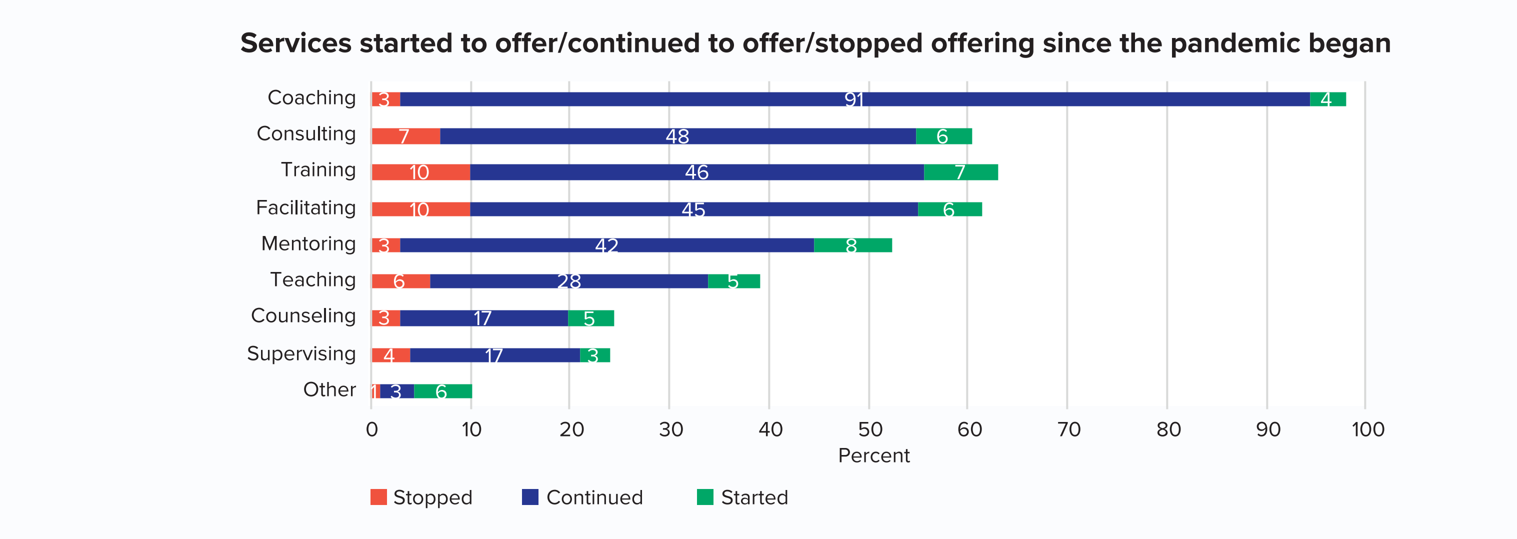
Almost half of coach practitioners (48%) said they had increased their hours spent receiving training since the pandemic started. The proportion varied from 45% in Western Europe to 54% in Latin America and the Caribbean.



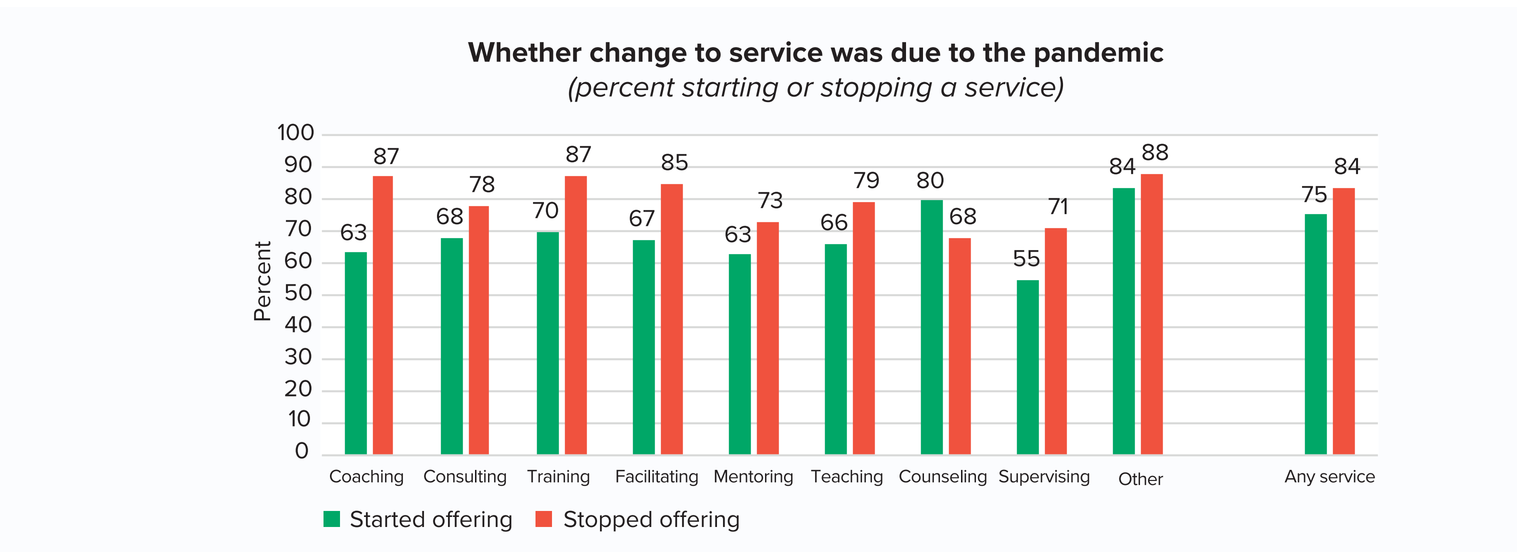
Services

A consistent finding from the *2020 ICF Global Coaching Study* is that almost all coach practitioners (94%) offer services in addition to coaching. Within that context, it was considered important to examine the extent to which coach practitioners may have changed the mix of services that they offer in response to the pandemic.

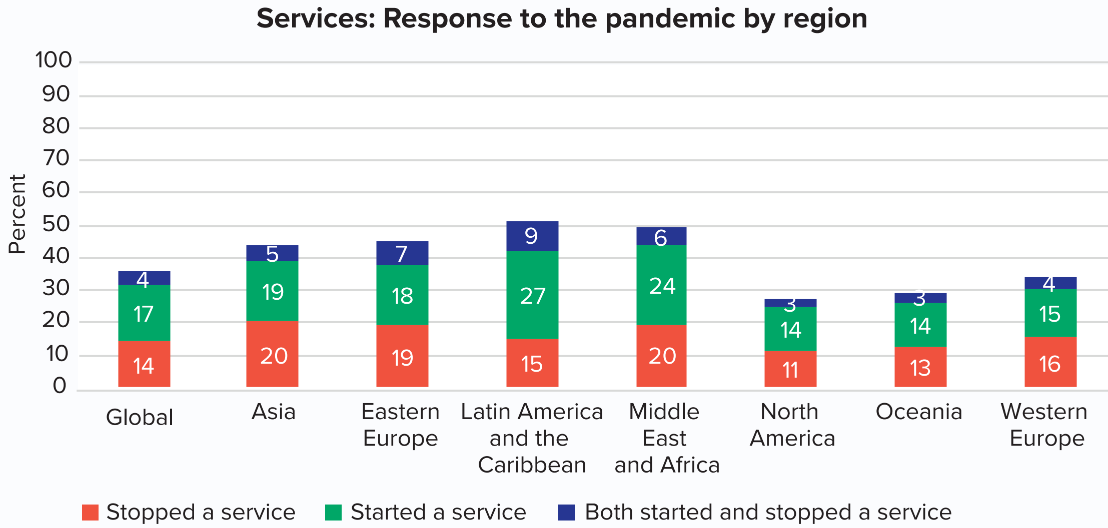
The change in the mix of services was assessed by first asking coaches which services they had started offering, continued to offer or stopped offering since the beginning of the pandemic. 48% of respondents said they had continued offering consulting services, 7% said they had stopped offering that service and 6% said they had added consulting to their repertoire of service offerings.



Coach practitioners who said they had started and/or stopped a service were asked if the changes they had made were in response to the pandemic. On average, 75% of services started were in response to the pandemic while 84% of services stopped were in response to the pandemic. **Overall, 81% of the service changes made by coach practitioners were attributed to the pandemic.**

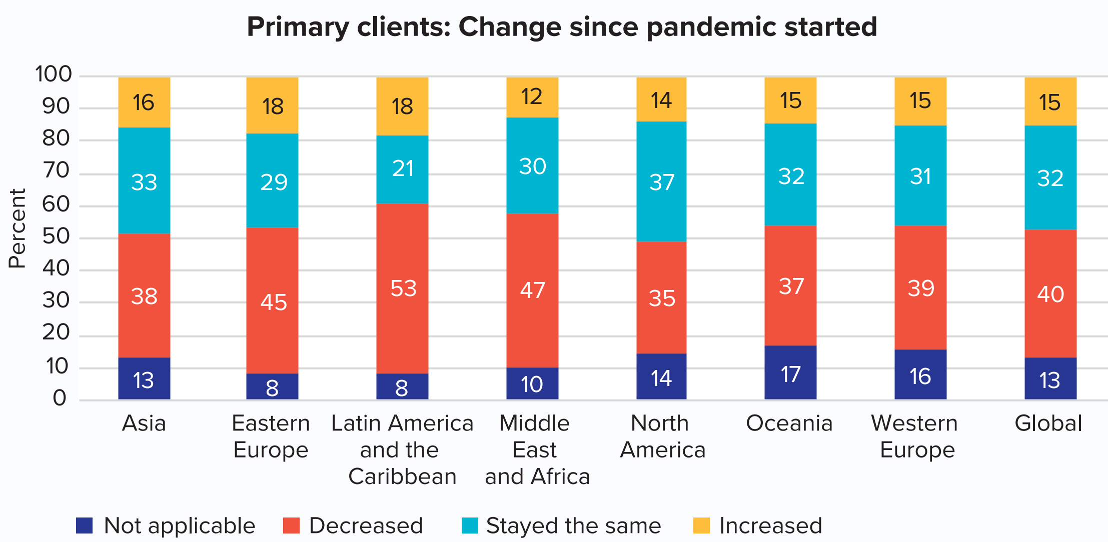


Overall, **36% of coach practitioners made one or more changes to their service offering specifically in response to the pandemic,** ranging from 51% of coach practitioners in Latin America and the Caribbean to 27% in North America.

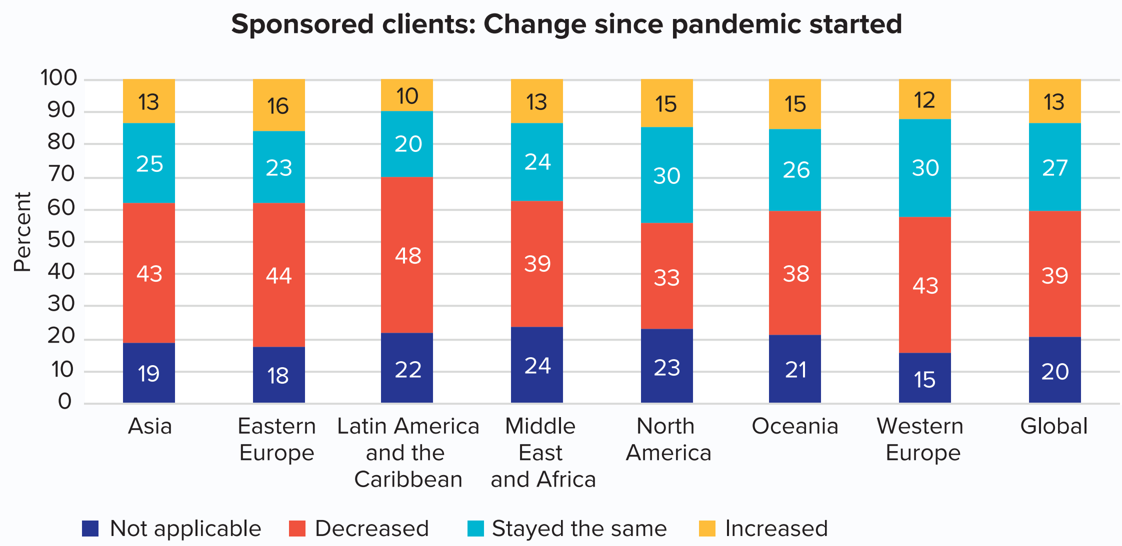


Primary and sponsored clients

Since the beginning of the pandemic, 40% of coach practitioners said they had experienced a decrease in primary clients (i.e., clients who pay for their own coaching).

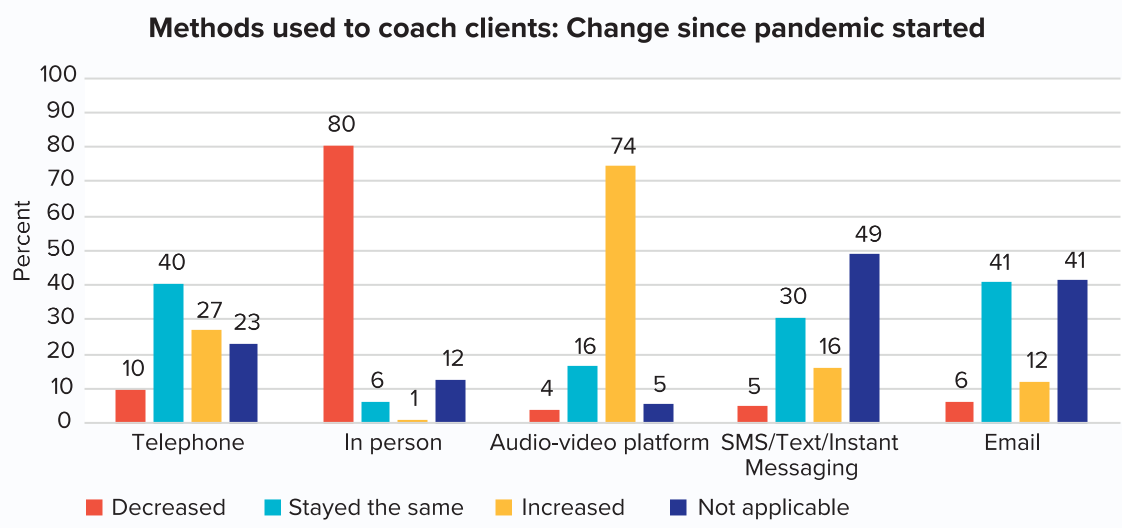


A similar proportion of coach practitioners (39%) said they had experienced a decrease in their sponsored clients (i.e., coaching paid for by someone other than the client).



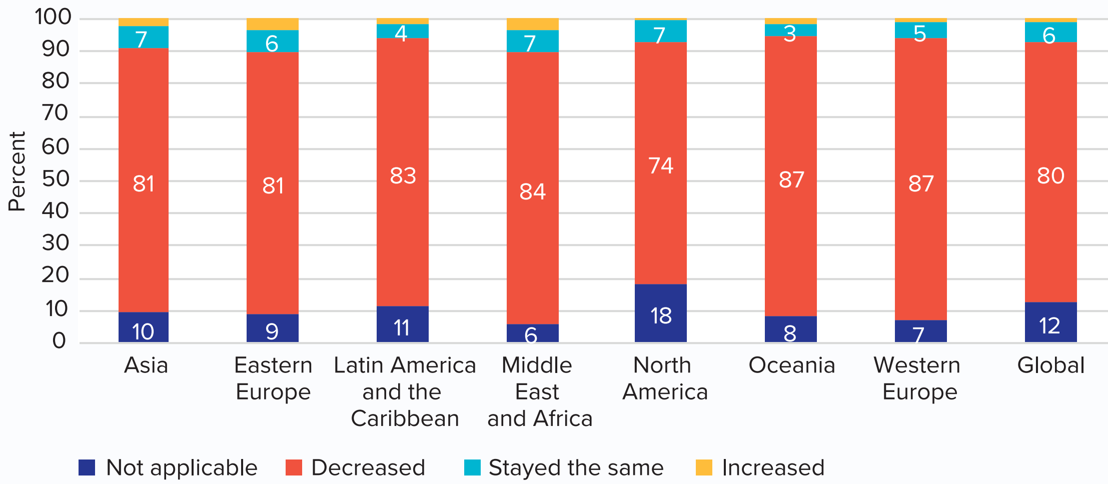
Methods used to coach clients

Since the pandemic, coach practitioners have adjusted their methods used to coach clients. Reflecting the nature of the pandemic, there has been a sharp decrease in coaching in person (80%). Mainly, coach practitioners have increased their of use of audio-video platforms (74%).



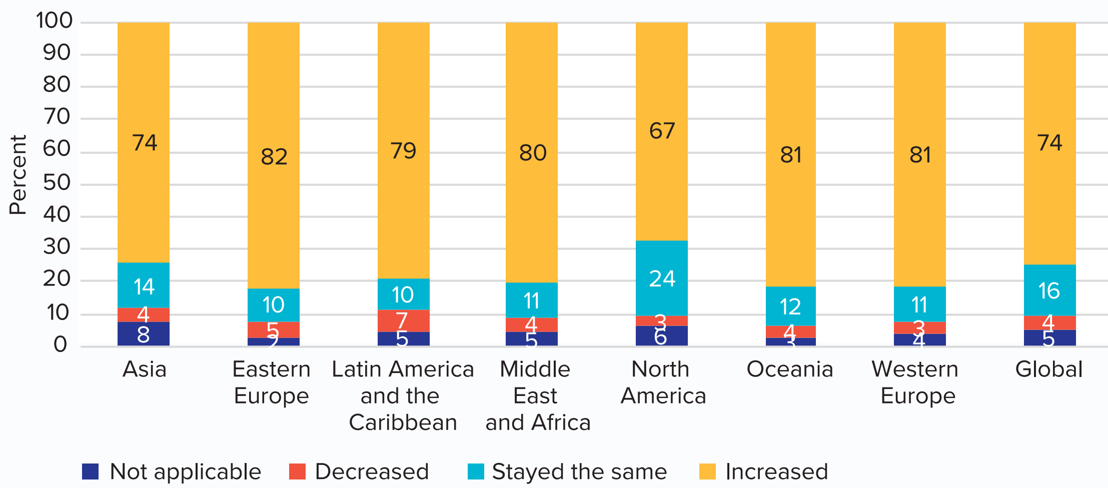
The regional patterns in changes to coaching methods have mirrored the global picture, with relatively little variation across the seven regions.

Coaching in person: Change since pandemic started



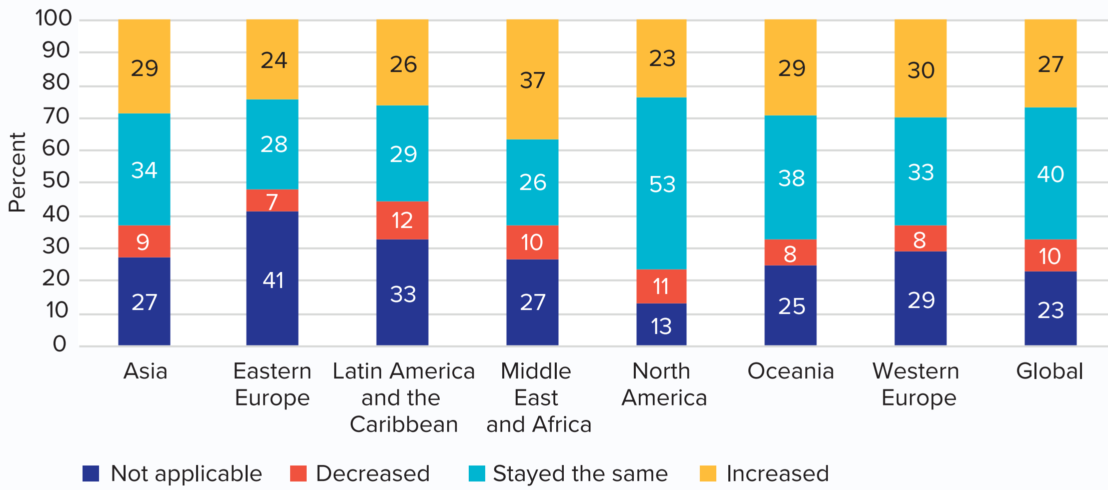
Similarly, all regions have seen large increases in the use of an audio-video platform to coach clients, from 74% in Asia to 82% in Eastern Europe.

Coaching via audio-video platform: Change since pandemic started



Coaching by telephone has also increased during the pandemic, albeit not to the same degree as audio-video platforms. The use of that method for coaching is more variable across the regions.

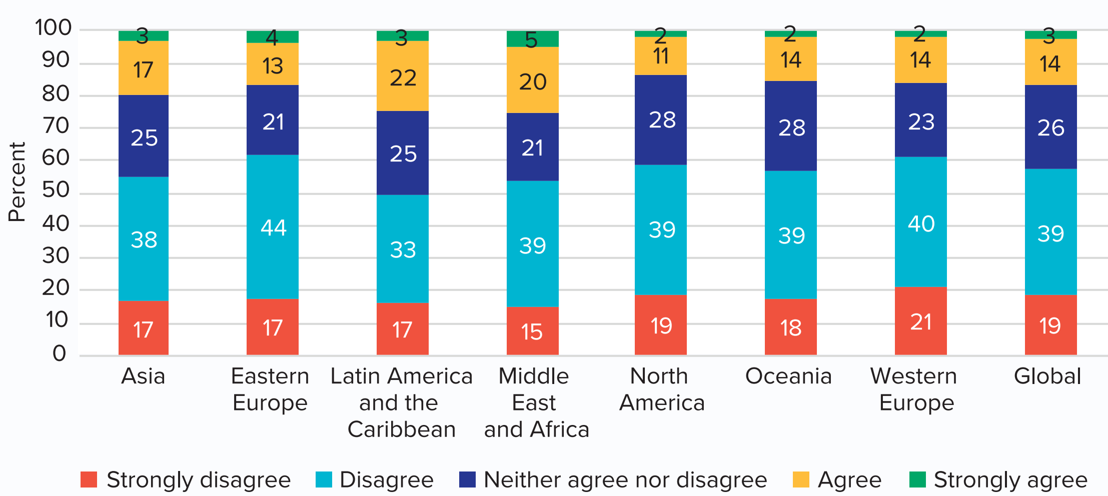
Coaching by telephone: Change since pandemic started



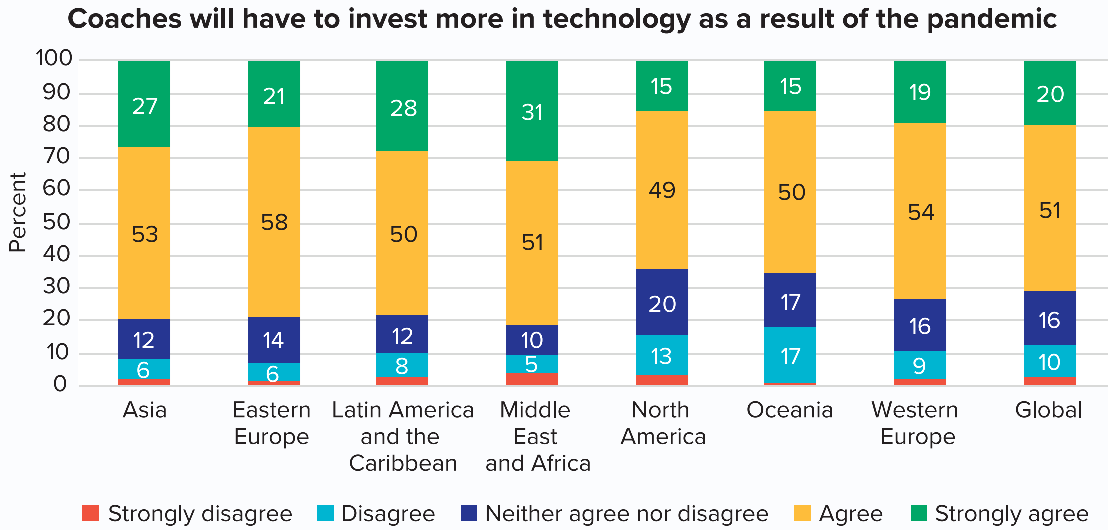
Coaching and Technology

Across all regions, a majority of coach practitioners disagreed with the statement: "The pandemic highlighted that coach practitioners did not have the right technology to deliver coaching." Globally, 19% strongly disagreed with the statement with a further 39% disagreeing. The proportions disagreeing/strongly disagreeing varied from 50% in Latin America and the Caribbean to 61% in Western Europe.

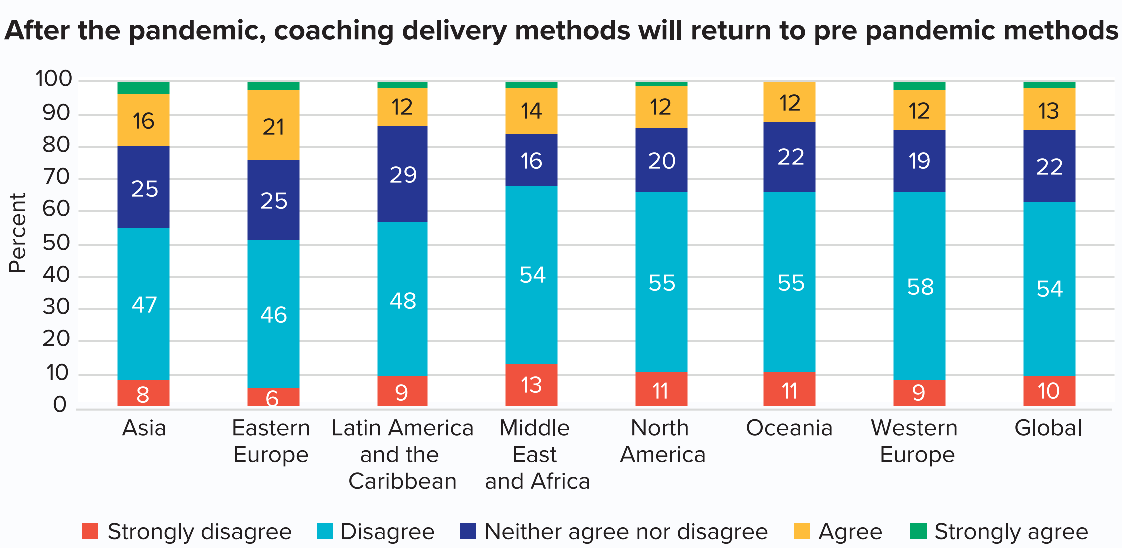
The pandemic highlighted that coaches did not have the right technology to deliver coaching



A large majority of coach practitioners (71%) agreed or strongly agreed that "coaches will have to invest more in technology in the future," ranging from 64% in North America to 81% in the Middle East and Africa.

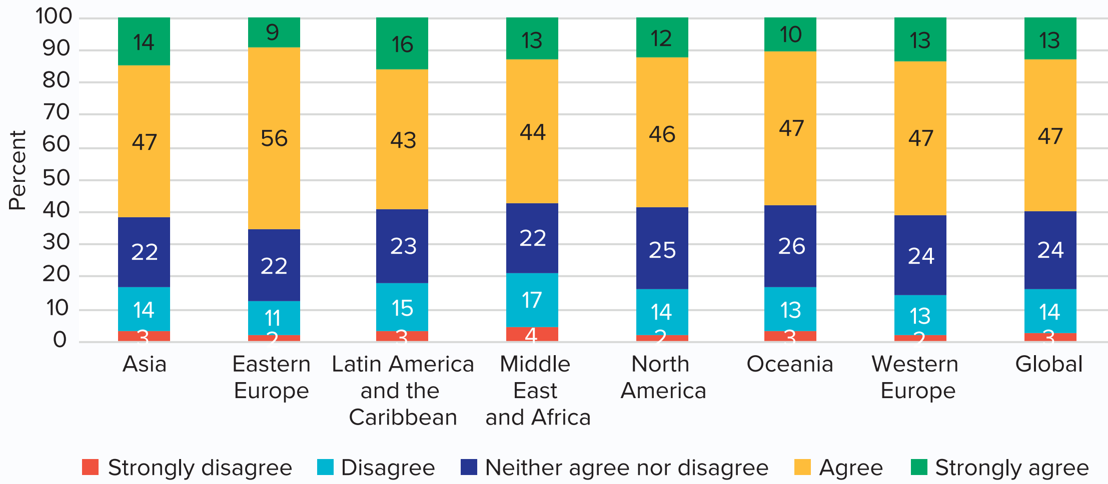


Perhaps anticipating that the pandemic will have enduring effects, the majority of coaches (63%) disagreed/strongly disagreed with the statement: "After the pandemic, coaching will return to pre pandemic methods." That sentiment was shared by 51% of coaches in Eastern Europe rising to 68% of coaches in the Middle East and Africa.



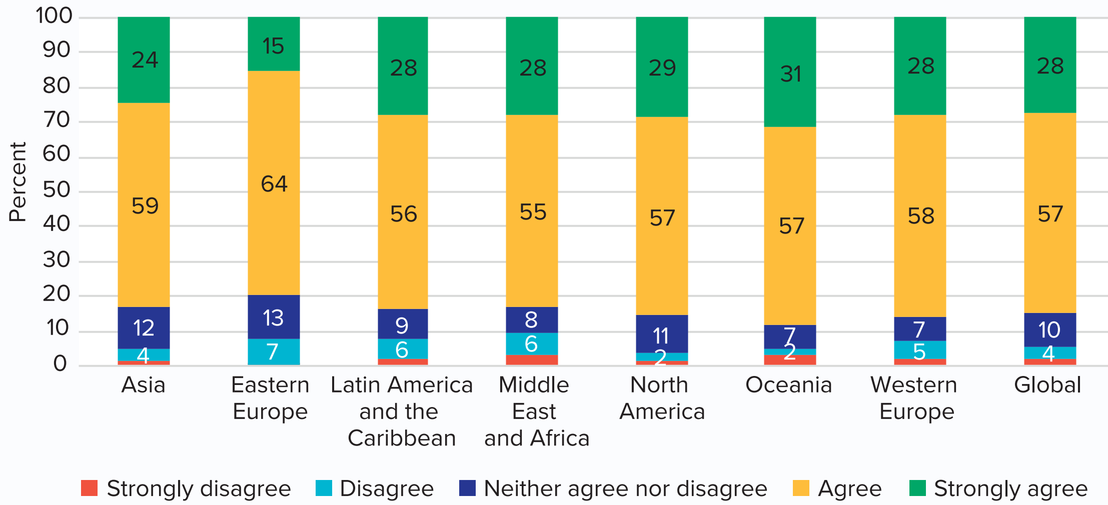
The majority of coach practitioners expressed confidence that they have "the right technology to ensure the security and confidentiality of client data," with six in ten (60%) saying they agree or strongly agree with the statement. The strength of agreement did not vary greatly by region, from 57% in the Middle East and Africa to 65% in Eastern Europe.

Coaches have the right technology to ensure the security and confidentiality of client data



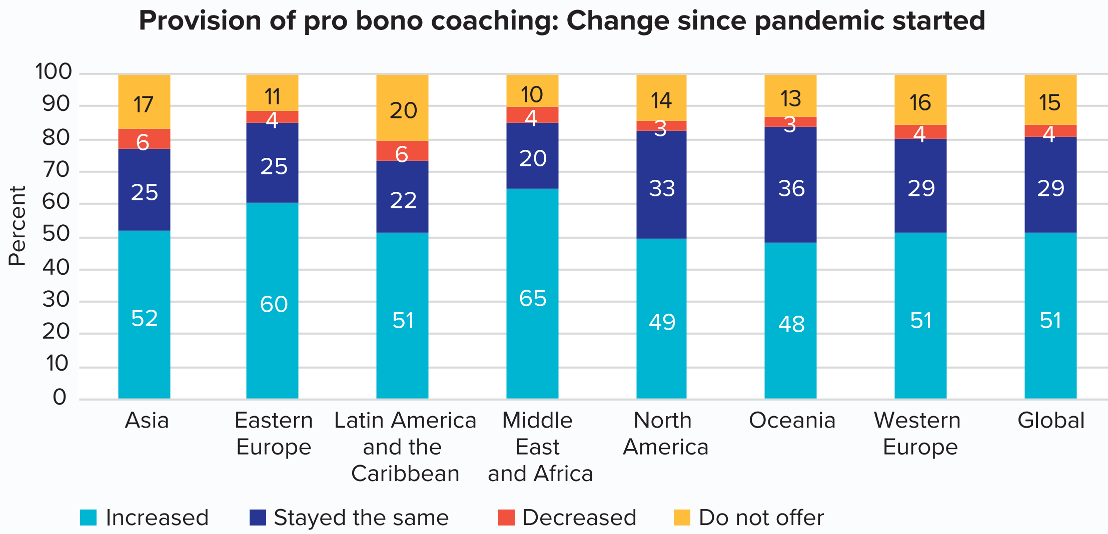
The large majority of coach practitioners (85%) agreed or strongly agreed with the statement: "Coaching clients have been willing to adapt to new technologies regarding their coaching sessions."

Coaching clients have been willing to adapt to new technology regarding their coaching sessions



Pro Bono Coaching

A majority of coach practitioners said they had increased their provision of pro bono coaching since the pandemic started. The proportions by region ranged from almost two in three (65%) in Middle East and Africa to slightly under one in two in Oceania (48%) and North America (49%).



SECTION 4 LOOKING AHEAD

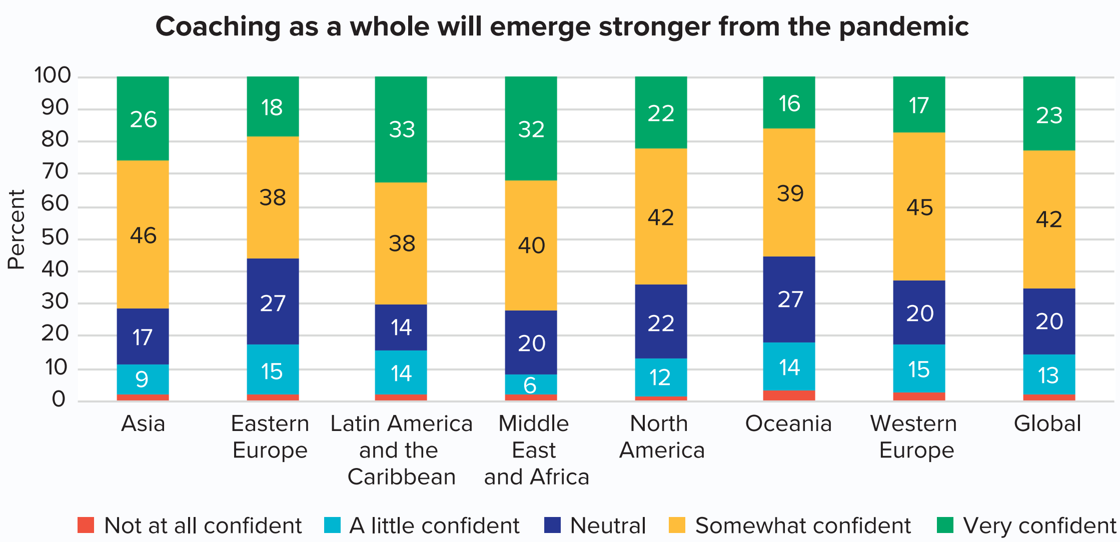
Introduction

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

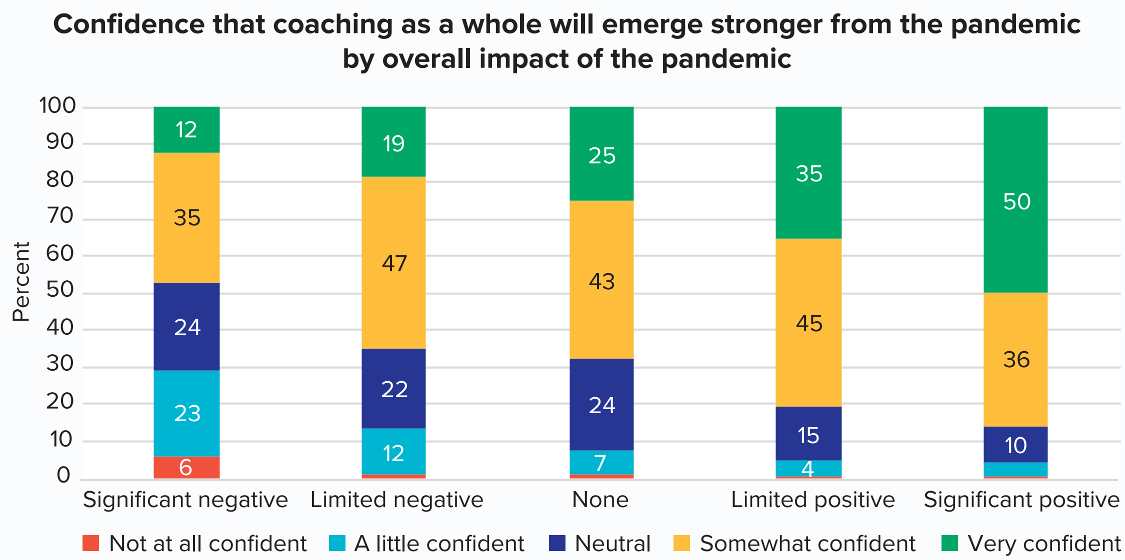
- Confidence regarding prospects for their own practice and for coaching as a whole.
- Potential shifts in the market for coaching.
- The biggest obstacle for coaching over the next 12 months.

Next six months: Confidence

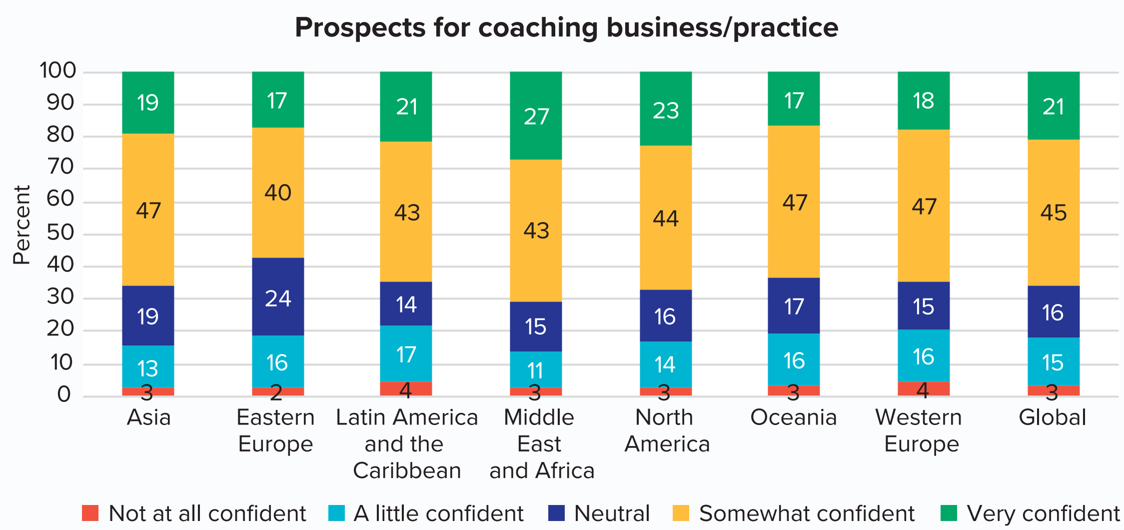
Coach practitioners are cautiously optimistic that coaching will emerge stronger from the pandemic over the next six months, with 42% saying they are “somewhat confident” and 23% ”very confident.”



The impact of the pandemic has clearly shaped coach practitioners’ expectations. Half (50%) of those who reported a significant positive impact said they are “very confident” that coaching will emerge stronger from the pandemic compared with 12% of those reporting that the pandemic had a significant negative impact on their practice.

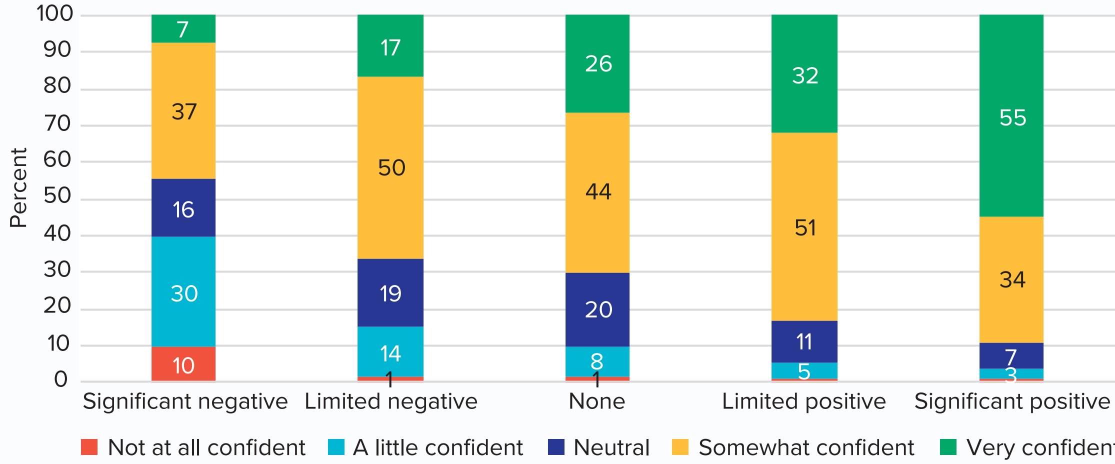


Reflecting their views on the overall outlook for coaching, coach practitioners are broadly optimistic about the prospects for their own coaching practice/business over the next six months, with 45% saying they are “somewhat confident” and 21% “very confident.”



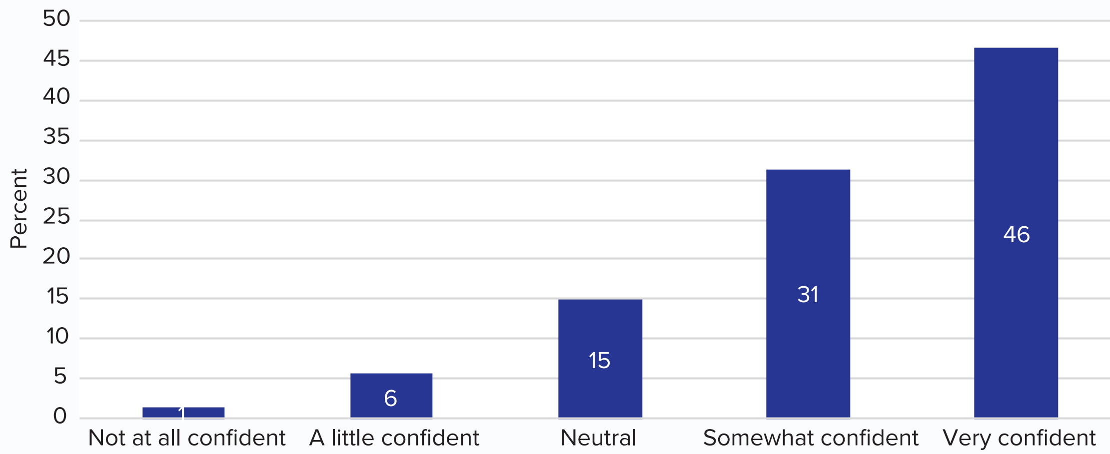
Again, coach practitioners’ confidence regarding their own business prospects are linked to their experience of the impact of the pandemic. Over half (55%) of those who reported a significant positive impact said they are ”very confident” compared with 7% of those for whom the pandemic had a significant negative impact.

Prospects for own coaching practice/business by overall impact of the pandemic



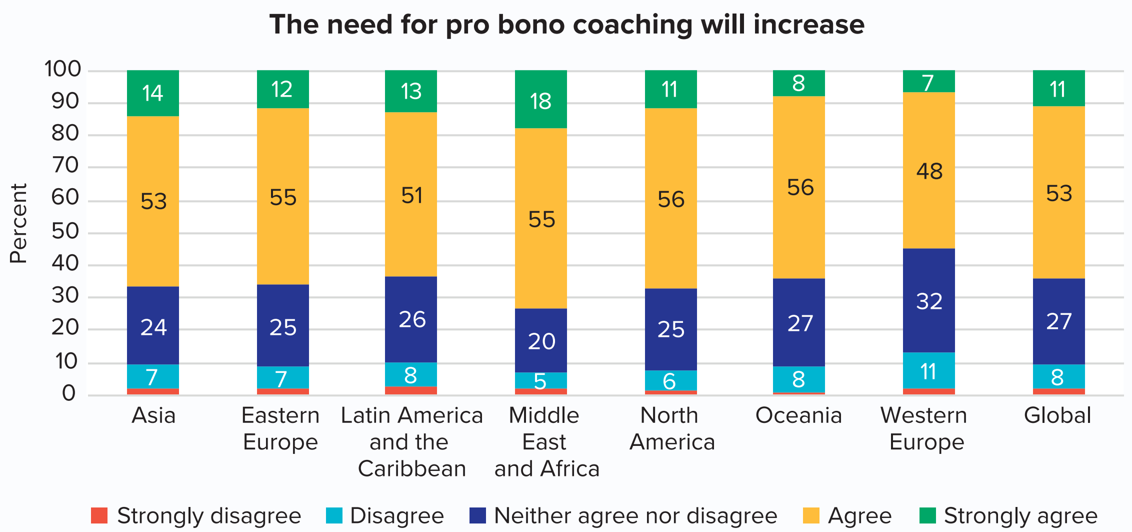
Internal coach practitioners (including respondents who self-identified as both internal and external coach practitioners) were asked about the outlook for the role of coaching within their own organization. Nearly half (46%) said they are ”very confident” that coaching would continue to have a role over the next six months. An additional 31% were “somewhat confident.”

Internal coach practitioners and mixed internal/external coach practitioners: Over the next six months, “Coaching will still have a role in the organization I work for …”



Next six months: Market trends

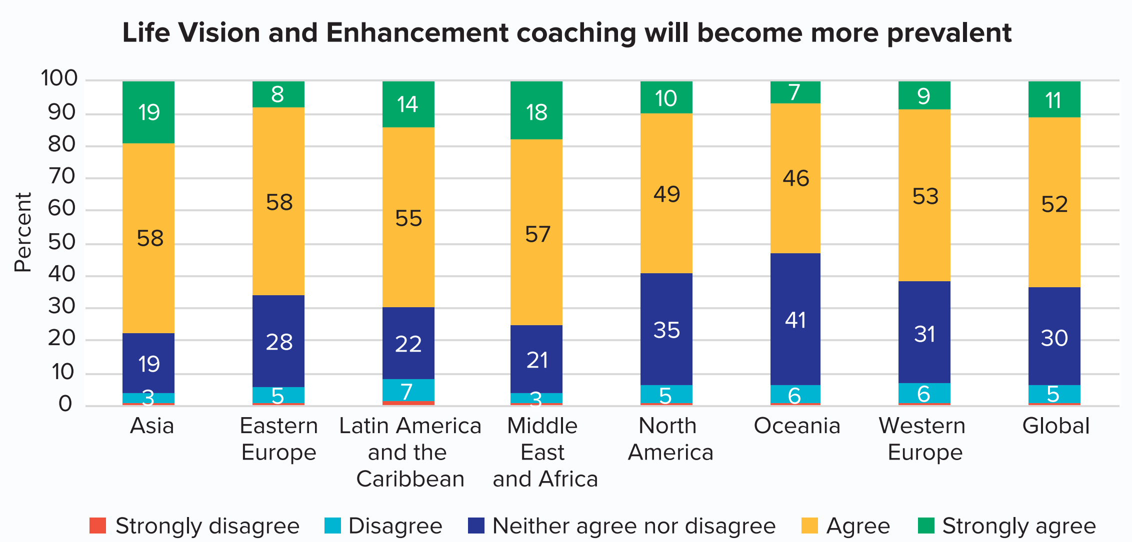
Across all world regions, most coach practitioners anticipate that, over the next six months, there will be increased need for pro bono coaching.



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

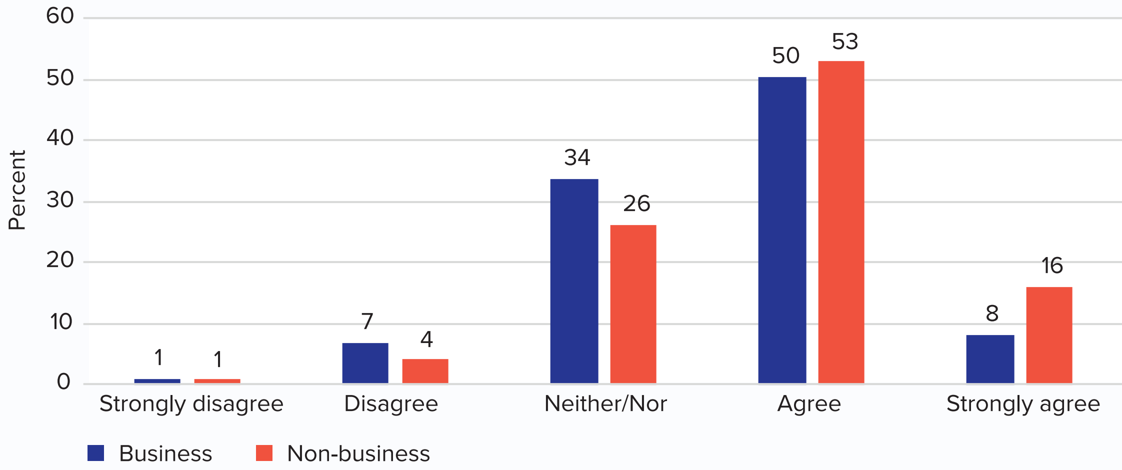
- Less experienced coach practitioners were more likely to agree/strongly agree that the need for pro bono will increase.
- Almost three in four (73%) coach practitioners with less than one year of experience agreed/strongly agreed that the need would increase compared with 59% of coach practitioners with 10 or more years of experience.
- Coach practitioners with a non-business specialty were more likely to say they agreed/strongly agreed that the need for pro bono coaching would increase (69% compared with 59% of coach practitioners with a Business Coaching specialty).

Respondents were in general agreement that Life Vision and Enhancement Coaching will become more prevalent over the next six months. A little more than half of coach practitioners (52%) agreed, with a further 11% strongly agreeing.



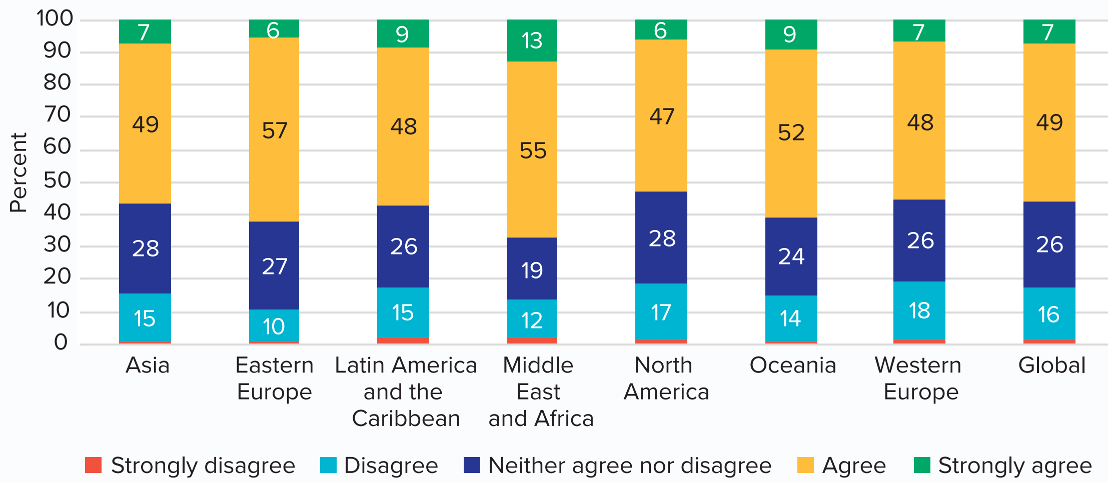
Regardless of main specialty, most coach practitioners were in broad agreement that Life Vision and Enhancement Coaching will become more prevalent.

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



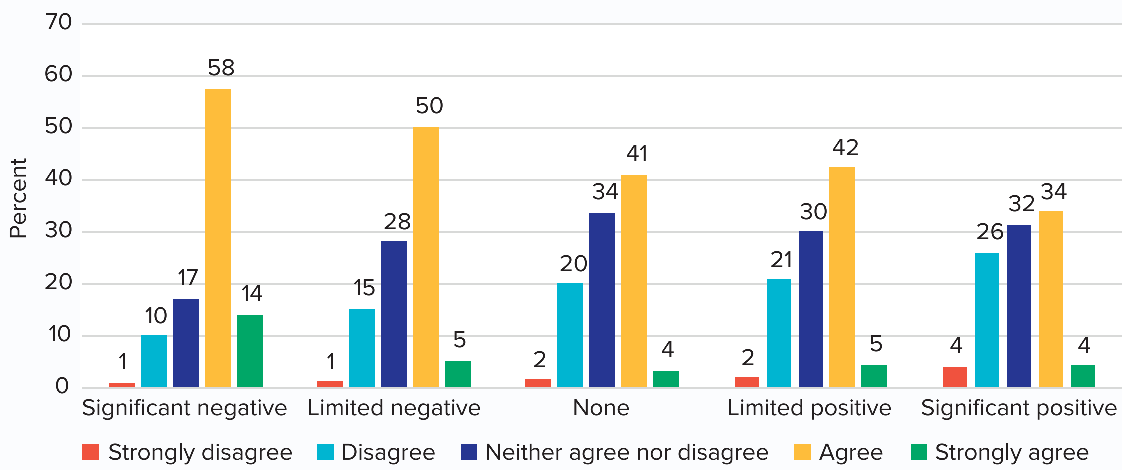
A majority of coach practitioners anticipate that the next six months will see downward pressure on coaching fees, with 49% agreeing that is likely to happen and 7% strongly agreeing.

There will be a downward pressure on coaching fees



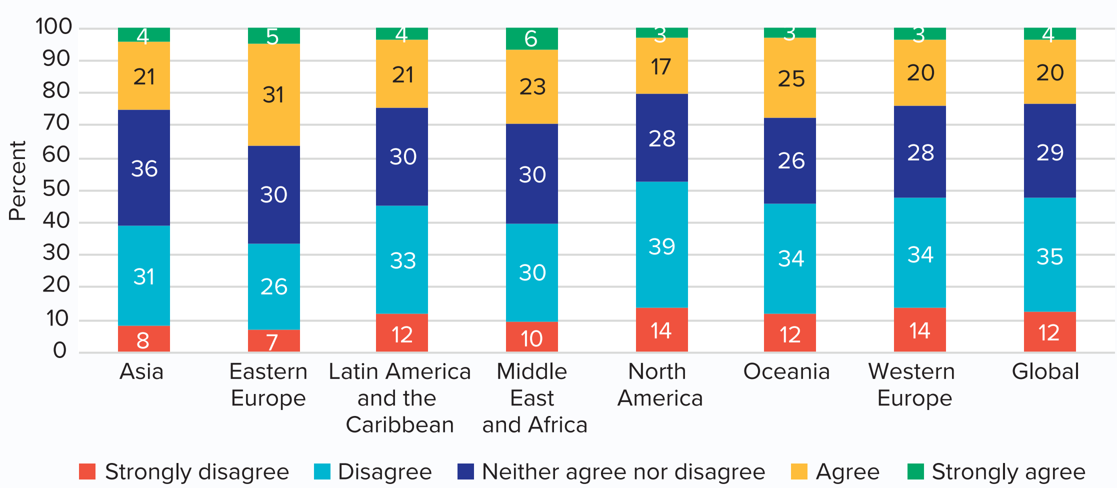
Expectations regarding coaching fees over the next six months have also been affected by the direction and severity of the overall impact of the pandemic. Almost three in four coach practitioners (72%) reporting a significant negative effect from the pandemic agreed/ strongly agreed that coaching fees will be subject to downward pressure, compared with 38% of those who reported a significant positive effect.

“There will be a downward pressure on coaching fees,” by overall impact of the pandemic



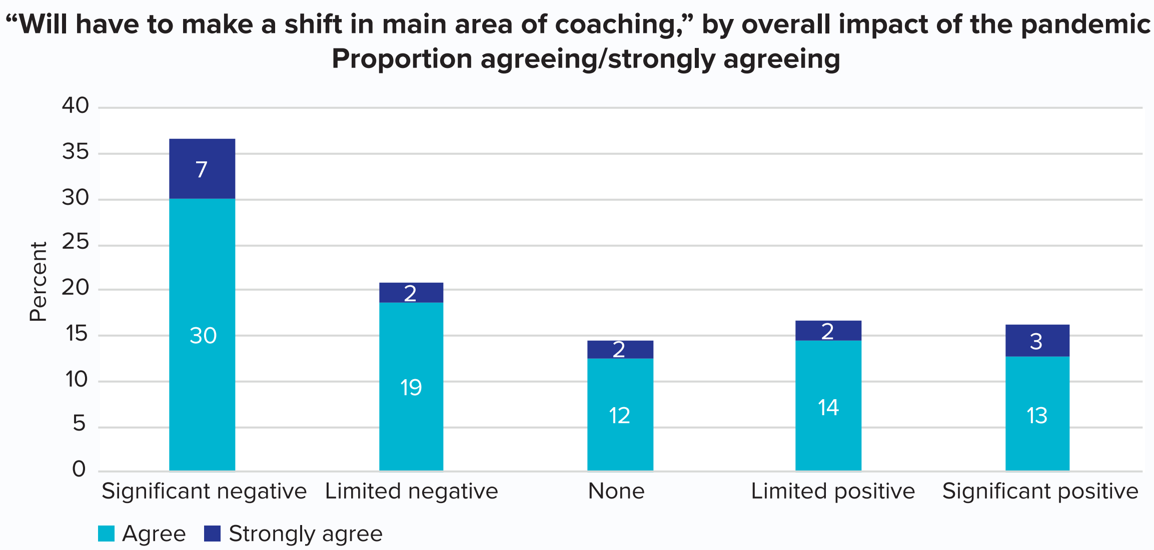
When asked about the likely evolution of their own coaching practice, relatively few coach practitioners expect that they will have to make a shift in their main area of coaching. One in five (20%) agreed that was a likely response to the pandemic with only 4% strongly agreeing.

Will have to make a shift in main area of coaching

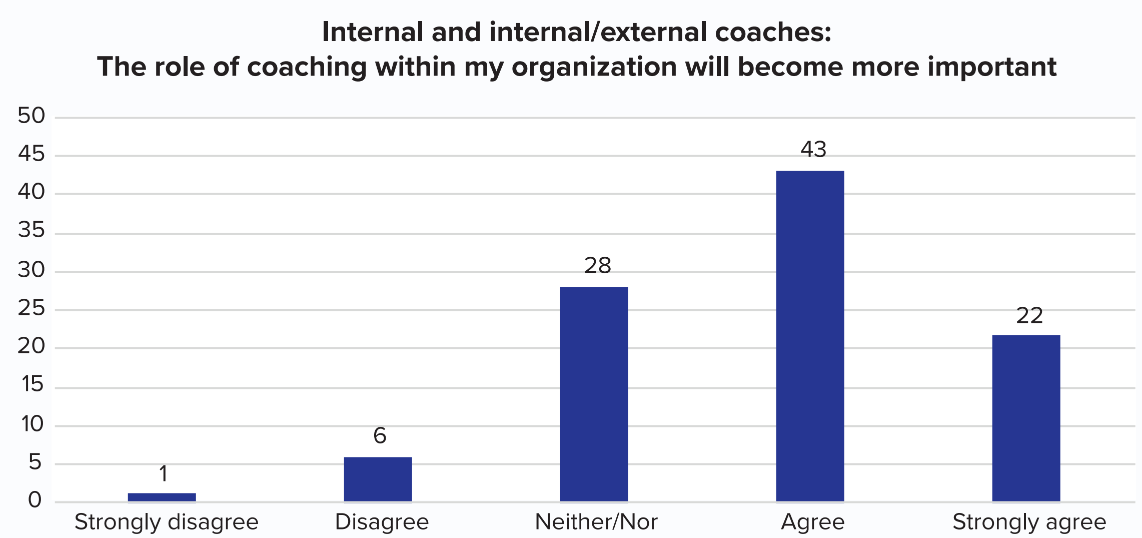


The proportion of coach practitioners agreeing or strongly agreeing that they would have to adjust their coaching specialty did not vary greatly according to factors such as their current main specialty, number of years coaching, age or gender.

Again, the overall impact of the pandemic was the main source of variation in the responses. Among those who said the overall impact had been significantly negative, 37% agreed or strongly agreed that they would have to make a shift in their main area of coaching, falling to 14% among those who said the pandemic had no overall impact.

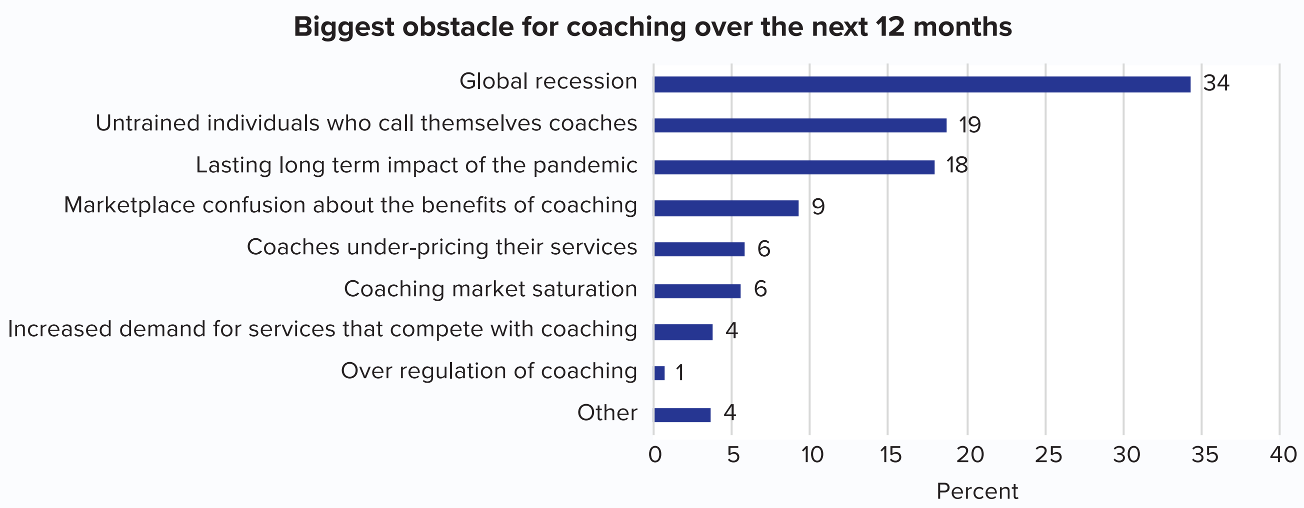


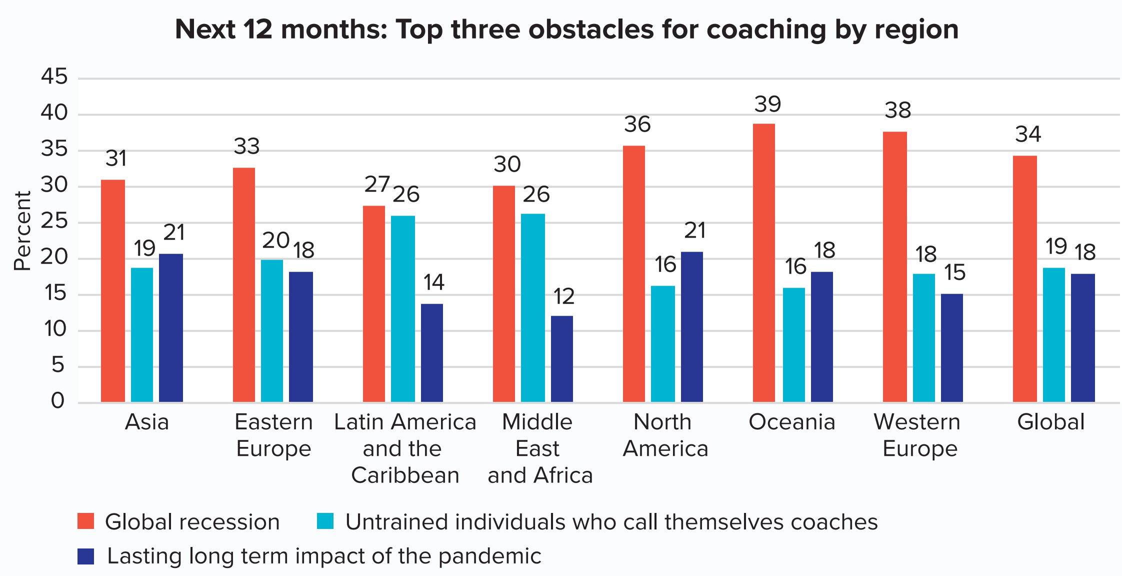
Almost two in three (65%) of internal coach practitioners and those who practice both internal and external coaching felt that the role of coaching within their organization will become more important over the next six months.



Next 12 months: Obstacles

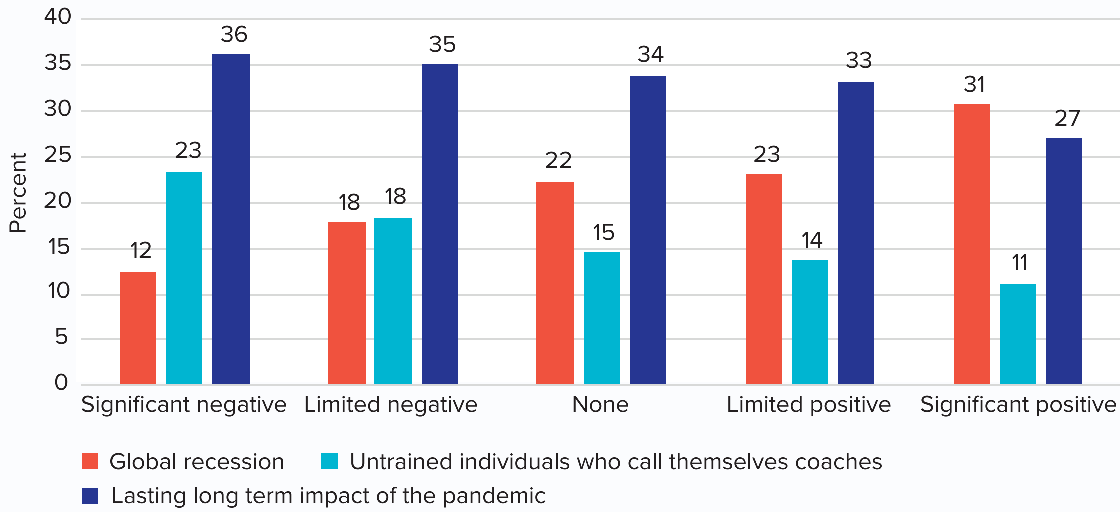
Looking at the next 12 months (i.e., the period through mid-July 2021), 34% of coach practitioners said they consider the possibility of a global recession to represent the biggest obstacle to coaching. Overall, coach practitioners were about equally split between those who regard untrained individuals who call themselves coaches (19%) to be the biggest obstacle and those who are most concerned about the long-term impact of the pandemic (18%).





The ranking of the three biggest obstacles varied more according to the overall impact of the pandemic on coach practitioners practice/business. Those who had experienced a negative impact were more concerned about the lasting impact of the pandemic whereas those where the impact was positive placed greater emphasis on untrained individuals as an obstacle to coaching over the next 12 months.

Biggest obstacle to coaching next 12 months, by overall impact of the pandemic



2020 GLOBAL COACHING STUDY

This report was designed as a supplement to the *2020 ICF Global Coaching Study*.

The Executive Summary of the *2020 ICF Global Coaching Study* is available as a free download at **coachfederation.org/2020study**. The Executive Summary presents the main findings from the study.

The Final Report, which offers detailed analysis and statistics is available for purchase at the same address.

Topics included in the Final Report:

- The Size and Scope of the Profession
- Summary Business Indicators
- Coach Practitioners
- Managers and Leaders Using Coaching Skills

The Final Report also includes a suite of Data Tables and a detailed Technical Appendix.