

The Coaching Industry in China

Evidence from the ICF Global Coaching Study

Long Beach, California - November 2007



Overview

Global overview

- E-survey launched on 22nd September 2006
- 20,845 invited to participate in ICF Global Coaching Study
- Of those, 6,821 signed up through the registration site
- E-survey available in English
- Self-completion option, downloadable in PDF format on the first page of e-survey for the following languages:
 - Spanish
 - French
 - German
 - Japanese
 - Mandarin
 - Russian

Global overview

- E-survey closed on 5th December 2006
- 10 week fieldwork period
- In total, 5,415 interviews completed via E-survey
- Breakdown of sample provided below

Sample breakdown	Number
Original ICF contact details sent	22,848
New members (sent after St Louis)	1,101
Registration sample	6,821
Total sample	30,077
Duplicates and invalid e-mail addresses	5,237
Delivery failures	4,688
Total valid sample	20,845
Survey completes	5,415
Survey response rate	26%

Overview

Registration Site

- A registration site was set up to encourage non-ICF members to participate in the survey
- This site was advertised on the ICF website, and those of other coaching organisations
- The registration site was PwC branded and captured the details of those who wished to take part in the survey
- An e-mail with a unique link to the survey was sent to all registrants

Sample Breakdown	Number
Those who registered interest on registration site	6,821
Those who did not start registration	1,401
Those who started registration but did not complete	1,030
Those who completed registration	4,390
Duplicates and invalid e-mail addresses	1,701
Valid sample from registration site	2,689
Survey completes	1,140
Registration response rate	42%

China overview

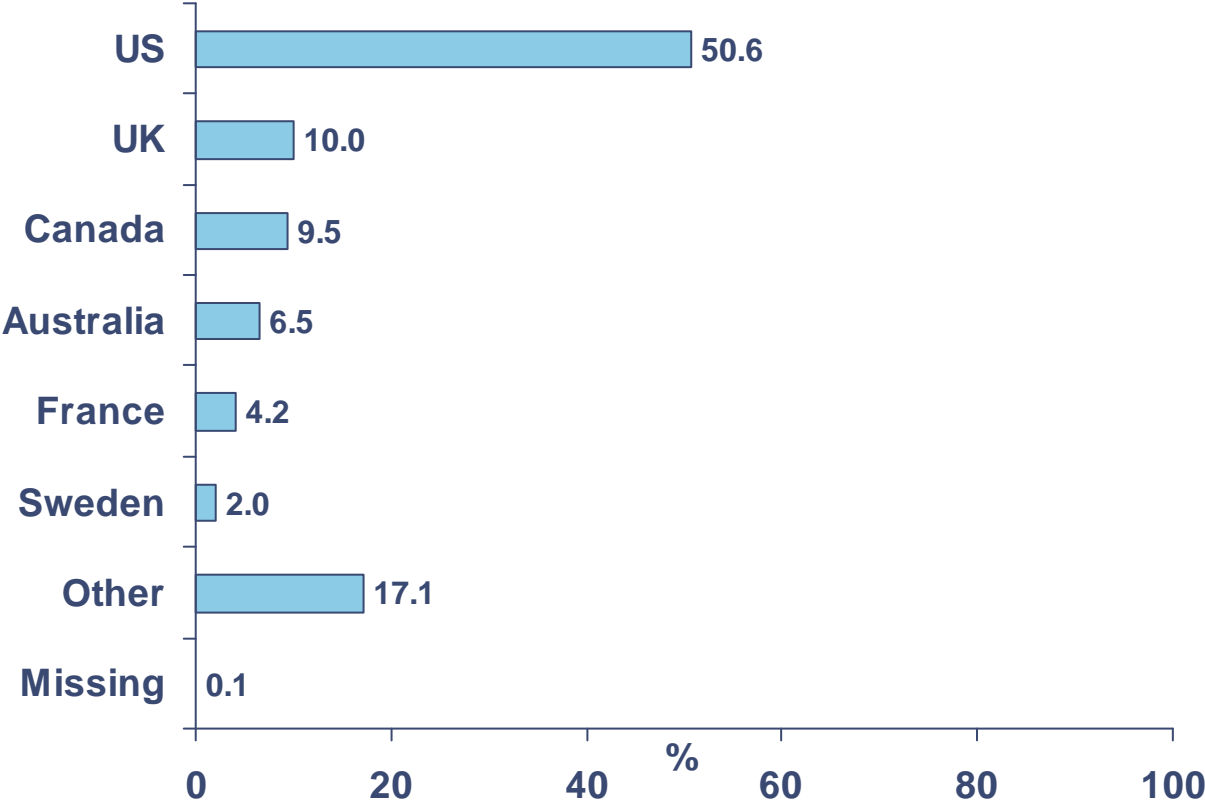
Overall assistance with the survey in China was provided by CCA, and the research in China would not have been a success without the kindness and assistance of Eva Wong.

- Self-completion questionnaires distributed by Eva Wong in China
- All self-completion questionnaires received by 23rd December 2006
- A total of 686 China postal returns received
- Questionnaires coded and data-entered by PwC ISU during January 2007
- The Chinese data is not included in the Global data, and has been analysed to provide comparison between China and the rest of the world
- Few respondents completed all of the questions, therefore there is a high level of “missing” response in the Chinese data
- In addition, the question relating to “annual revenue generated by coaching alone” was only answered by a small number of respondents

Country Participation

Country Participation

5,415 respondents to Global e-survey*



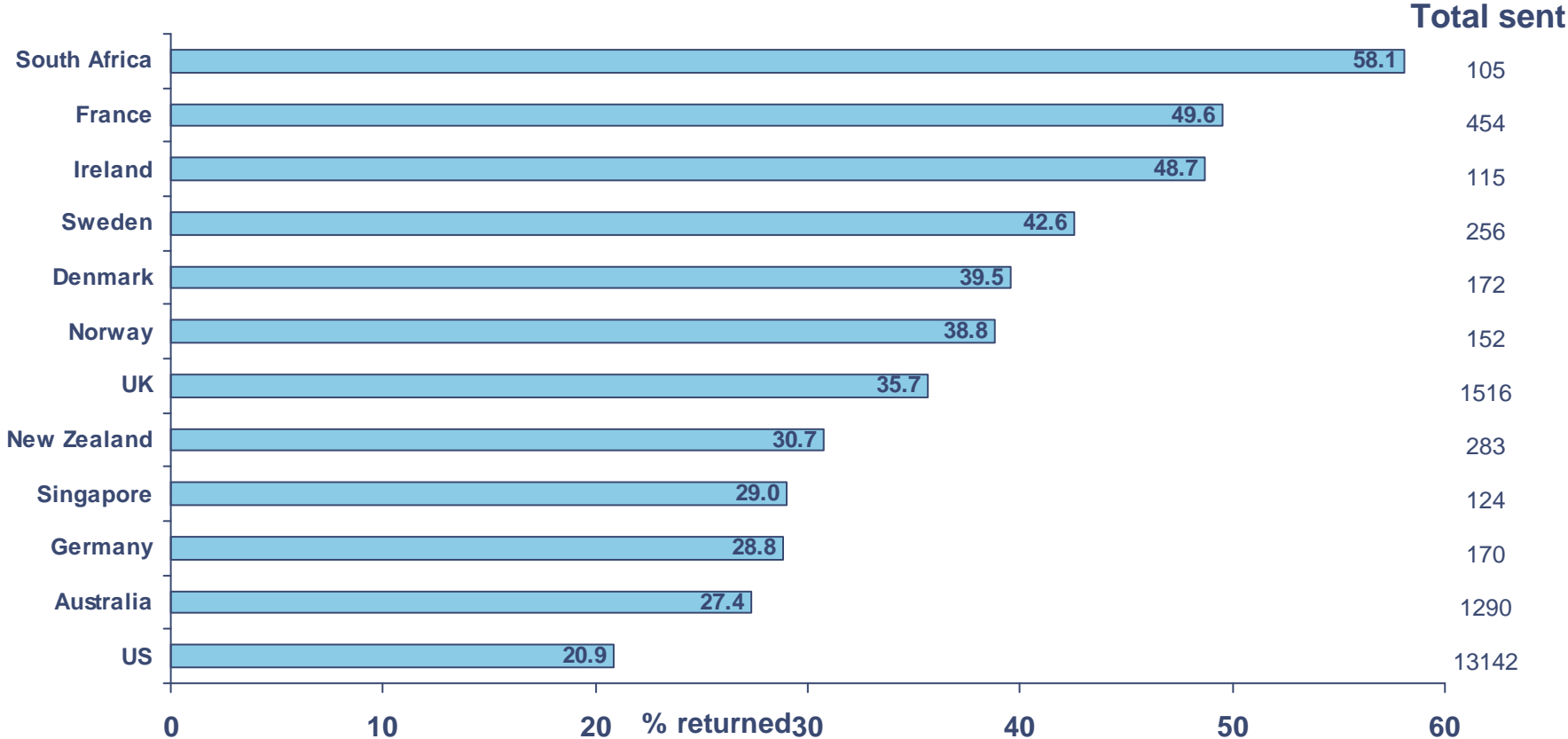
Base: 5415

- Completed e-survey responses from 73 countries
- An additional 686 self-completion questionnaires were received from China

*Note: This figure excludes the Chinese self-completion questionnaires

Country Participation

Leader board* ...



Base: 5415

*Note: As there is no data on the total number of contacts in China, the response rate for China cannot be calculated.

Profile of Coaching Industry

Profile of Coaching Industry

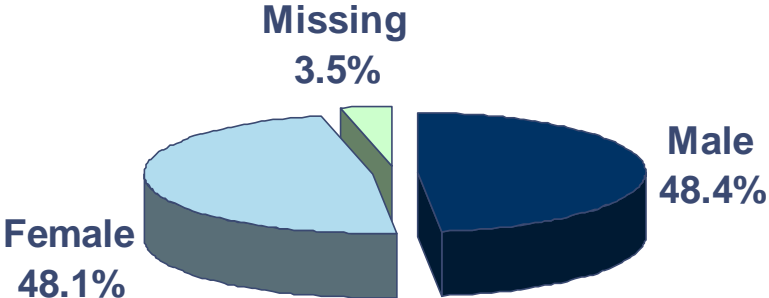
Gender profile

Global



Global Base: 5415

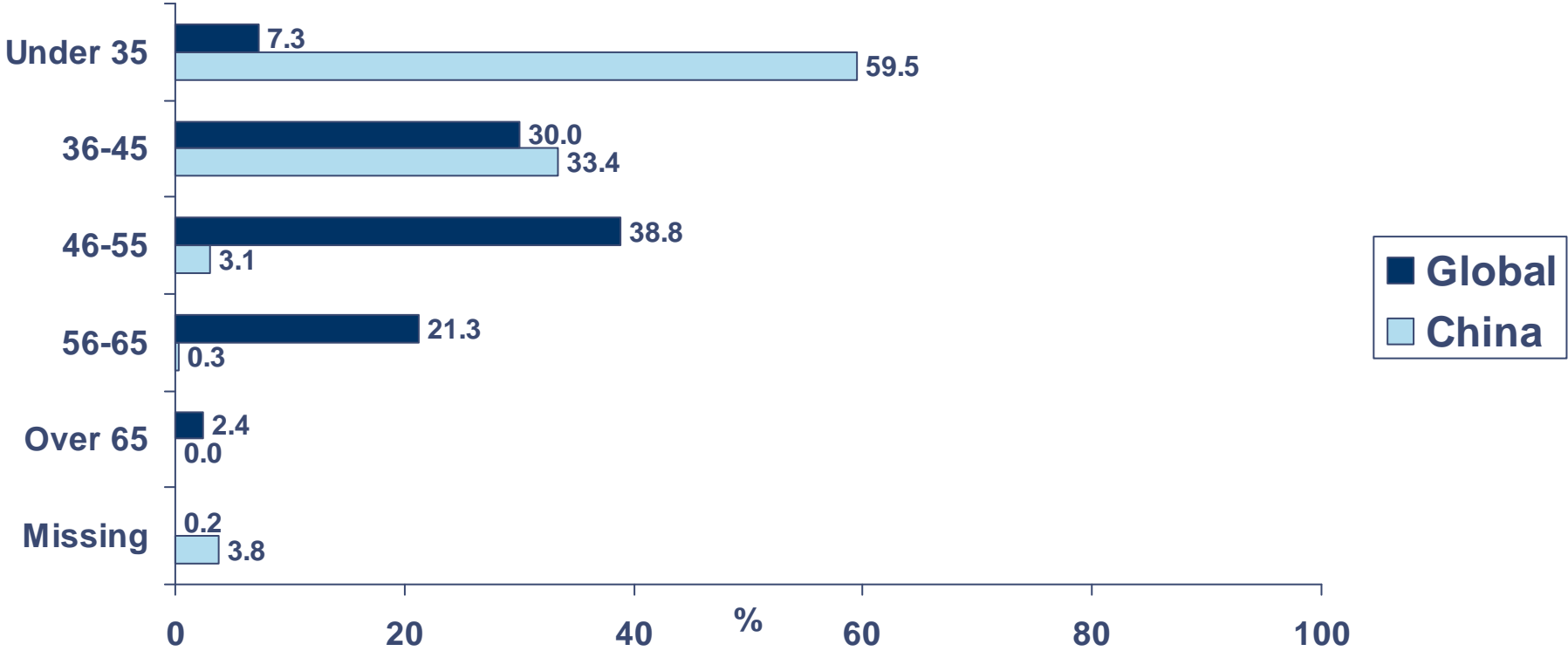
China



China Base: 686

Profile of Coaching Industry

Age profile



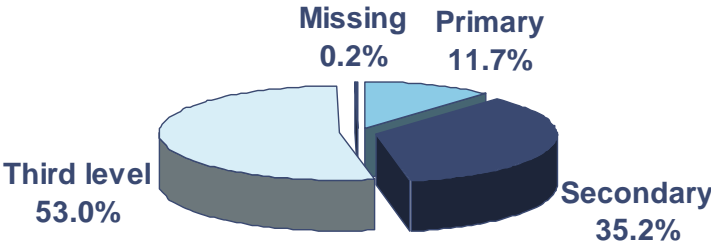
Global Base: 5415

China Base: 686

Profile of Coaching Industry

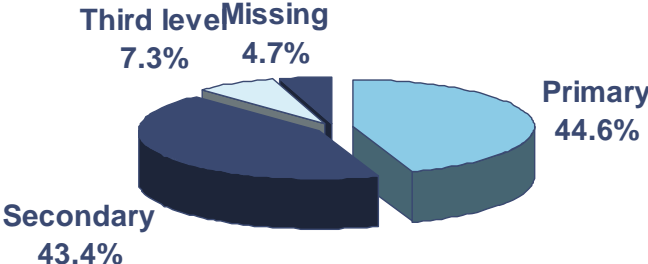
Level of formal education

Global



Global Base: 5415

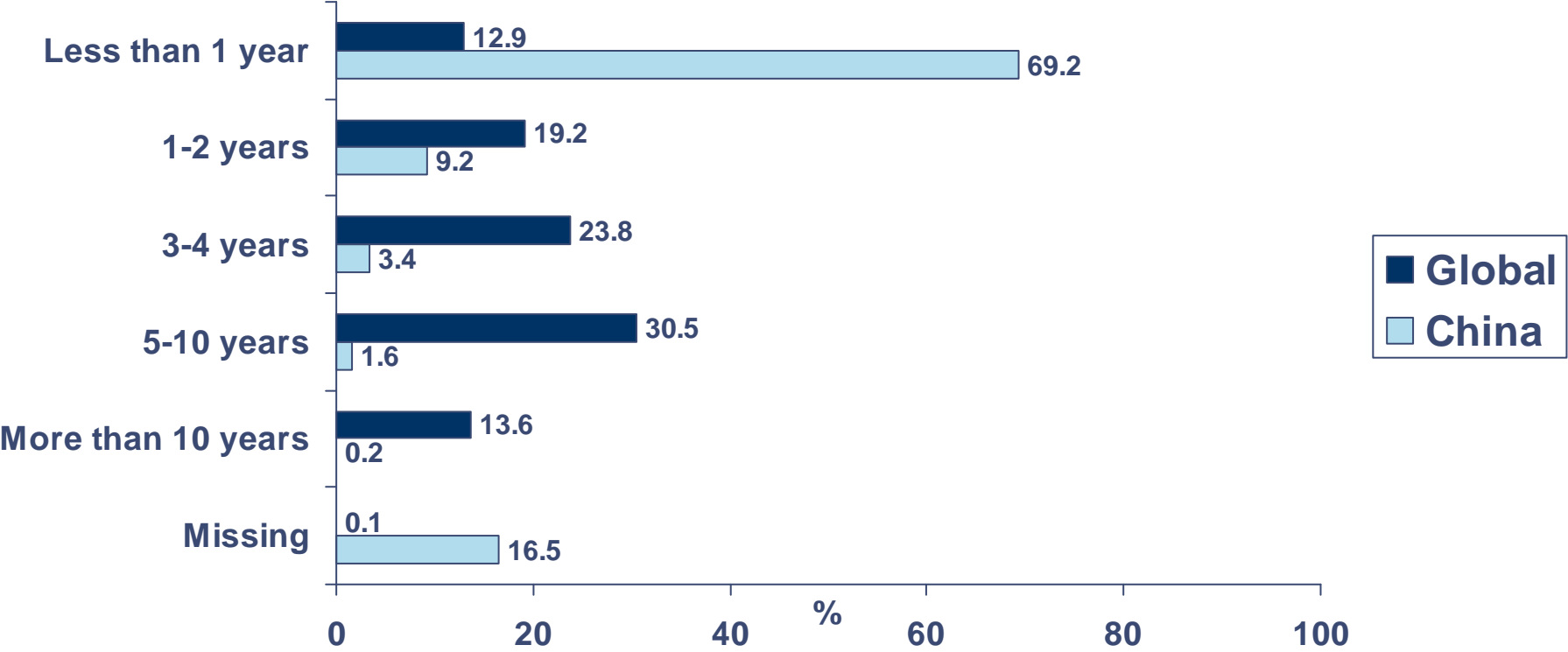
China



China Base: 686

Profile of Coaching Industry

Length of time coaching

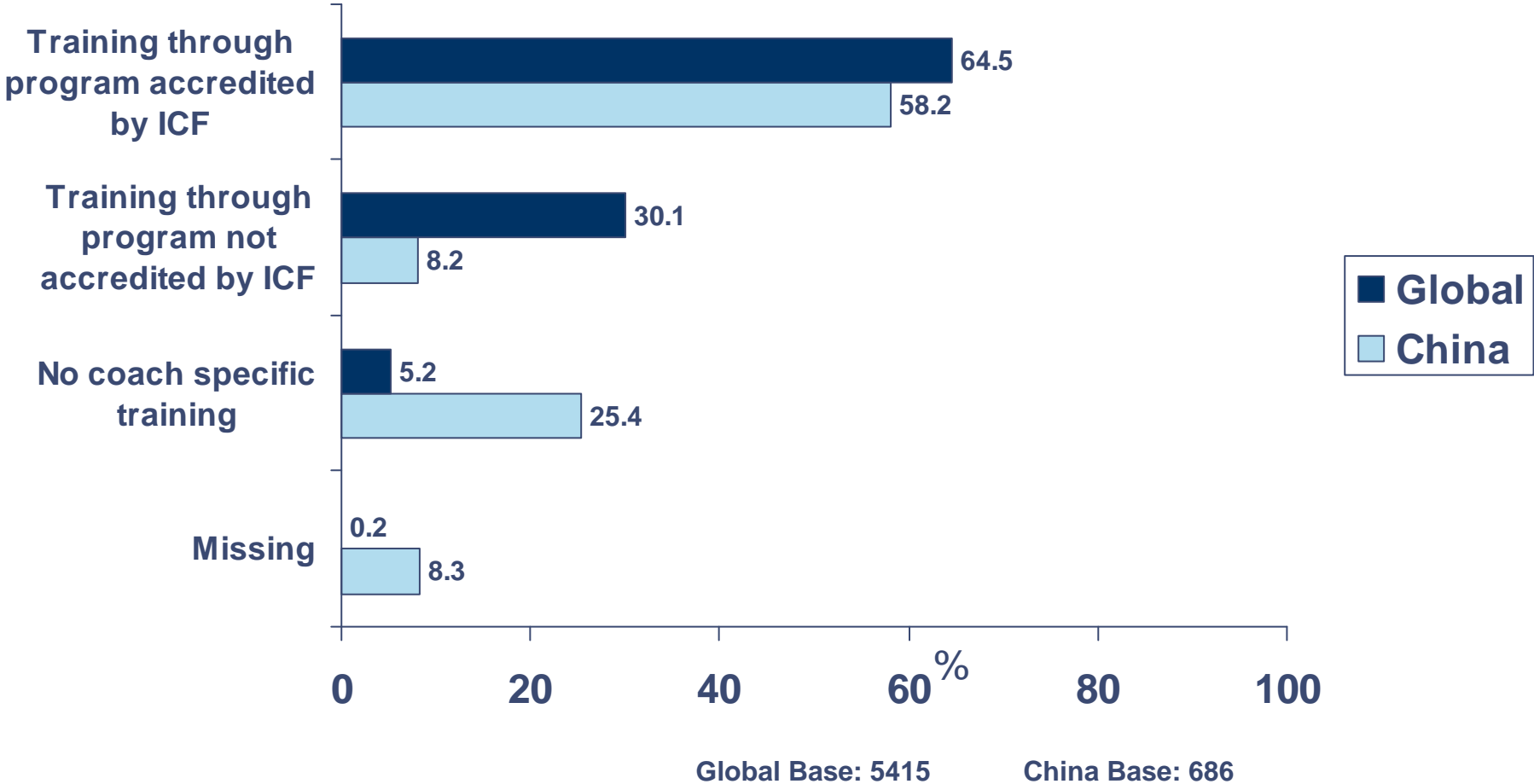


Global Base: 5415

China Base: 686

Profile of Coaching Industry

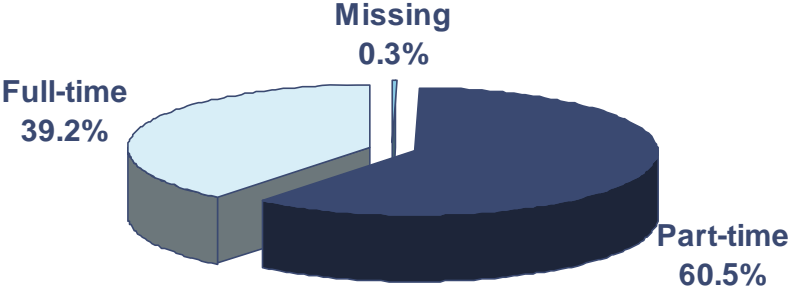
Coach specific training



Profile of Coaching Industry

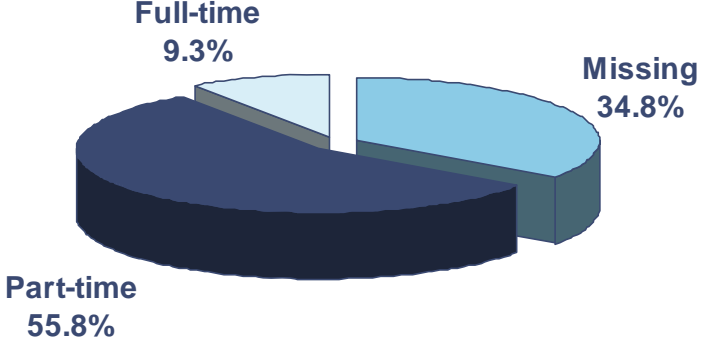
Full-time or part-time?

Global



Global Base: 5415

China



China Base: 686

Profile of Coaching Industry

The areas of coaching specialities...(1 of 2)

Global



Global Base: 5415
Multiple response: totals >100%

China

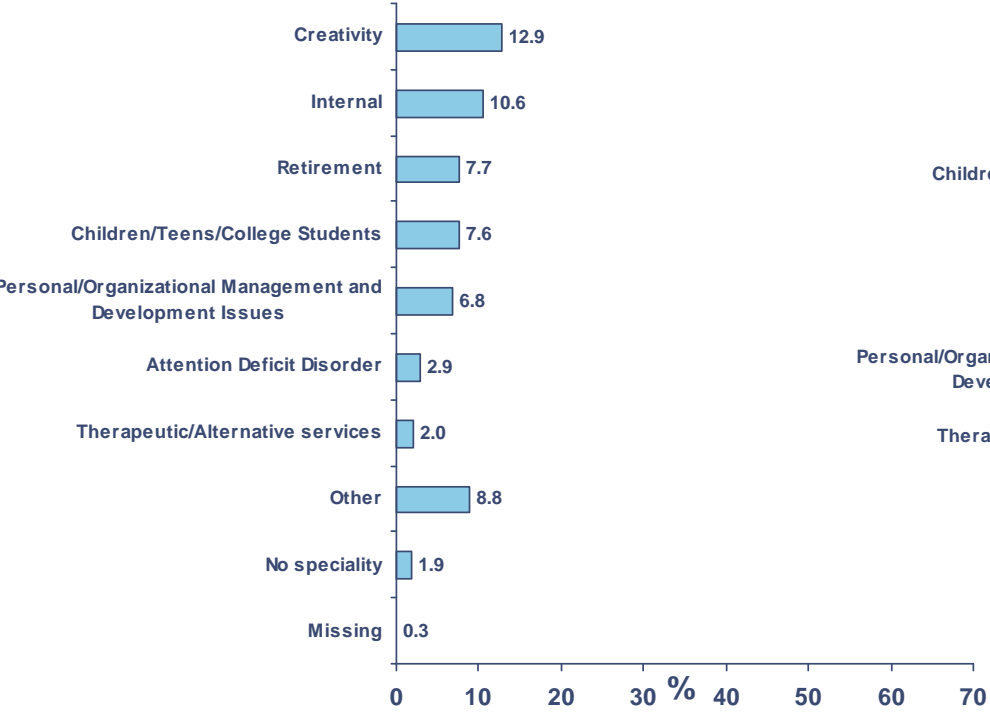


China Base: 686

Profile of Coaching Industry

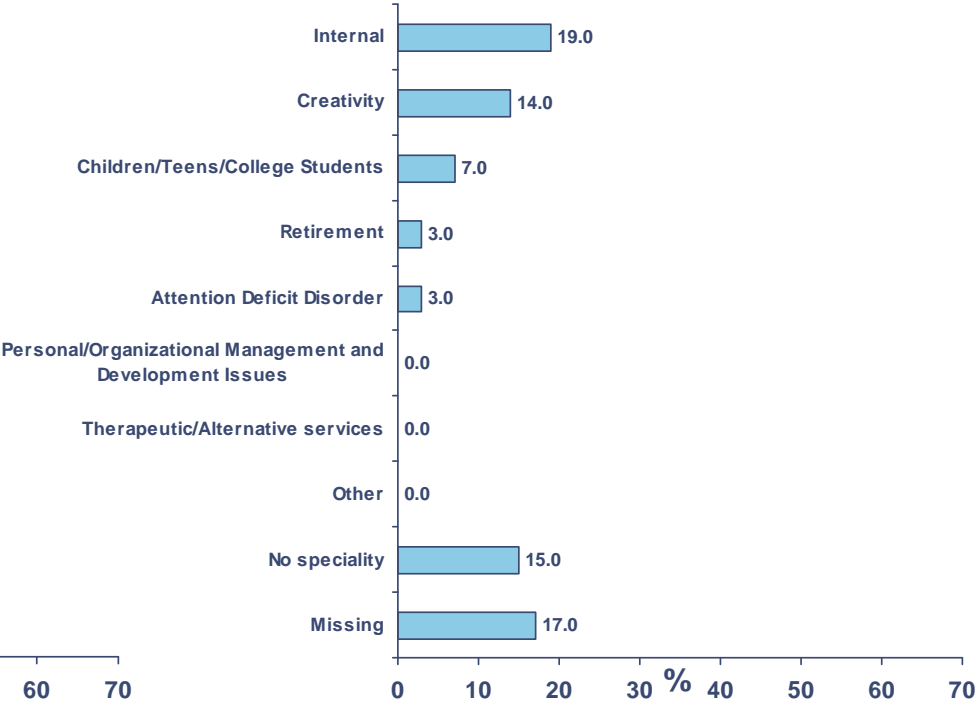
The areas of coaching specialities...(2 of 2)

Global



Global Base: 5415
Multiple response: totals >100%

China

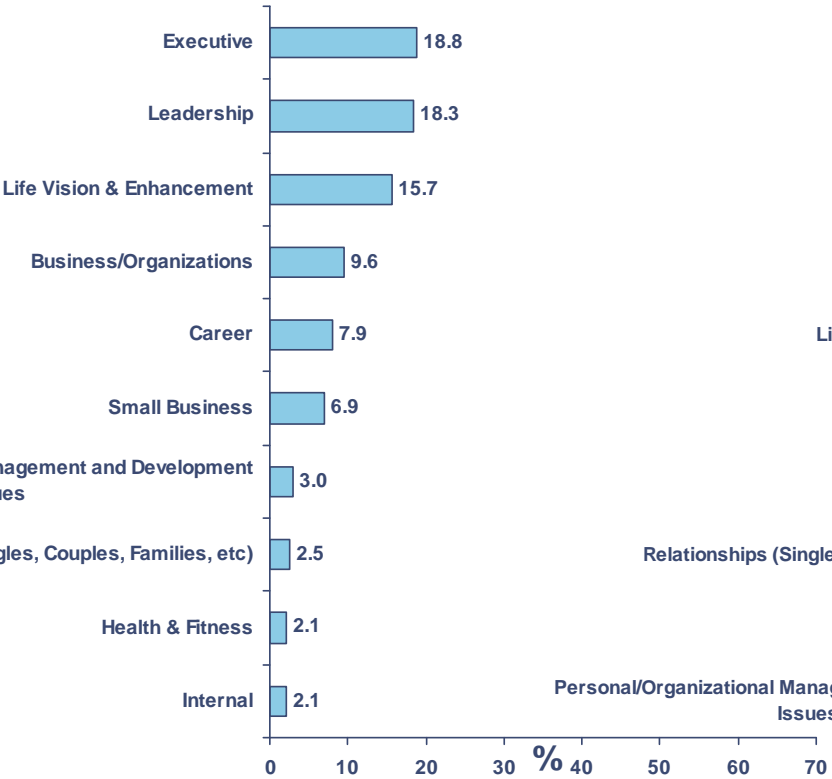


China Base: 686

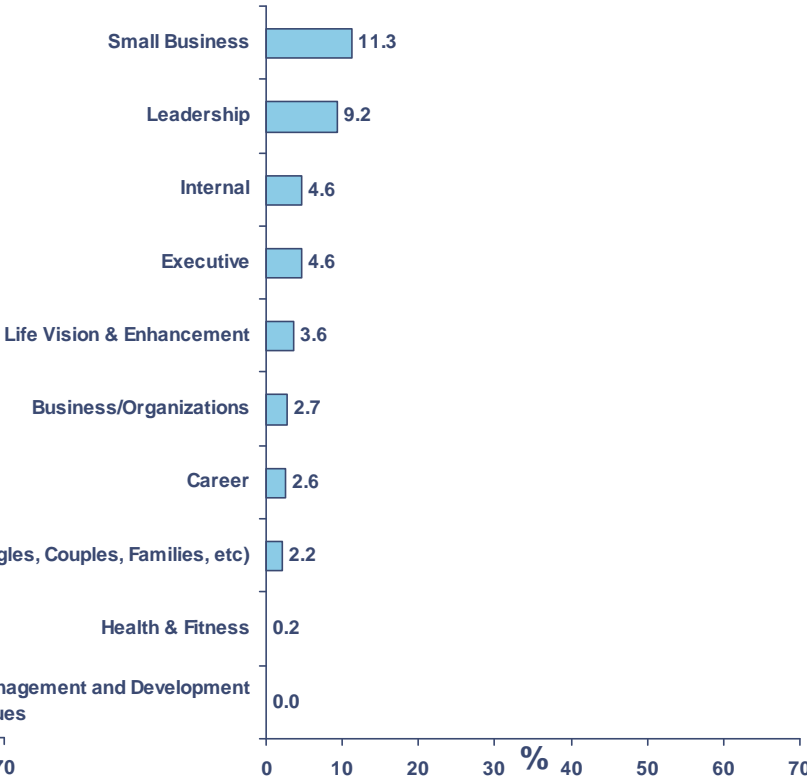
Profile of Coaching Industry

The main coaching speciality...(1 of 2)

Global



China



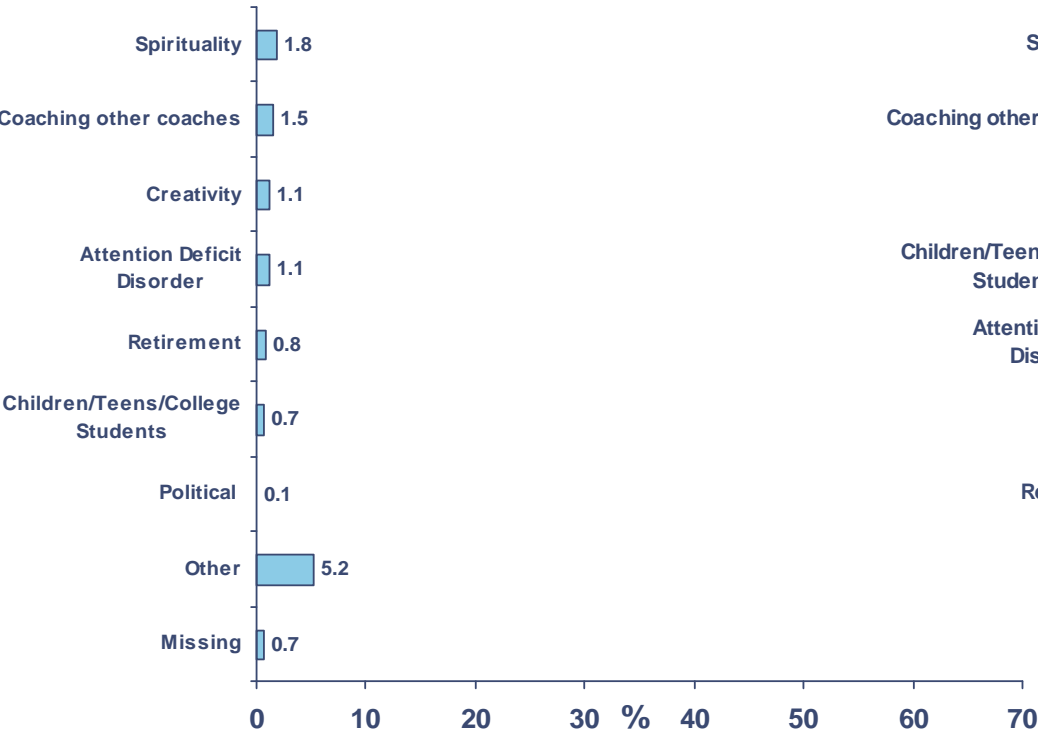
Global Base: 5312

China Base: 585

Profile of Coaching Industry

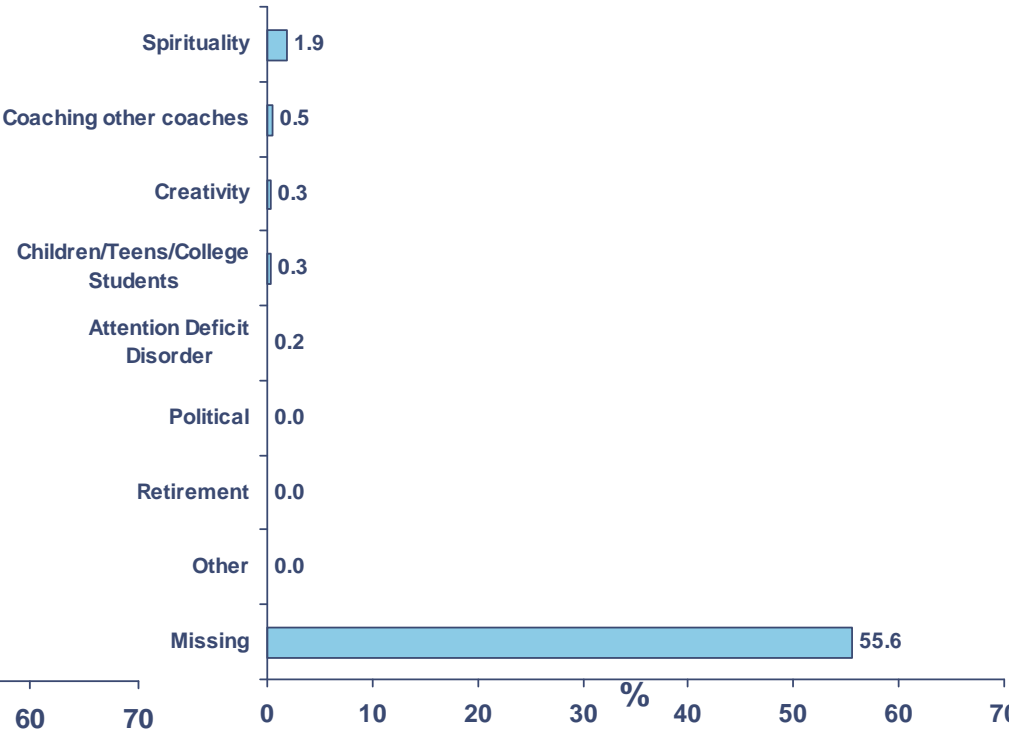
The main coaching speciality...(2 of 2)

Global



Global Base: 5312

China

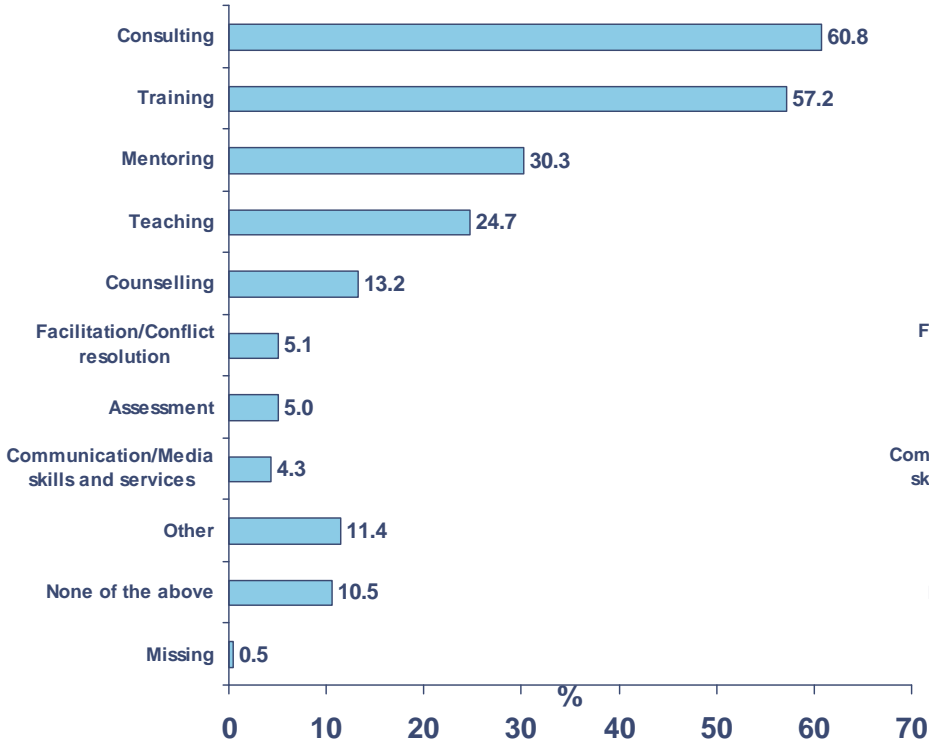


China Base: 585

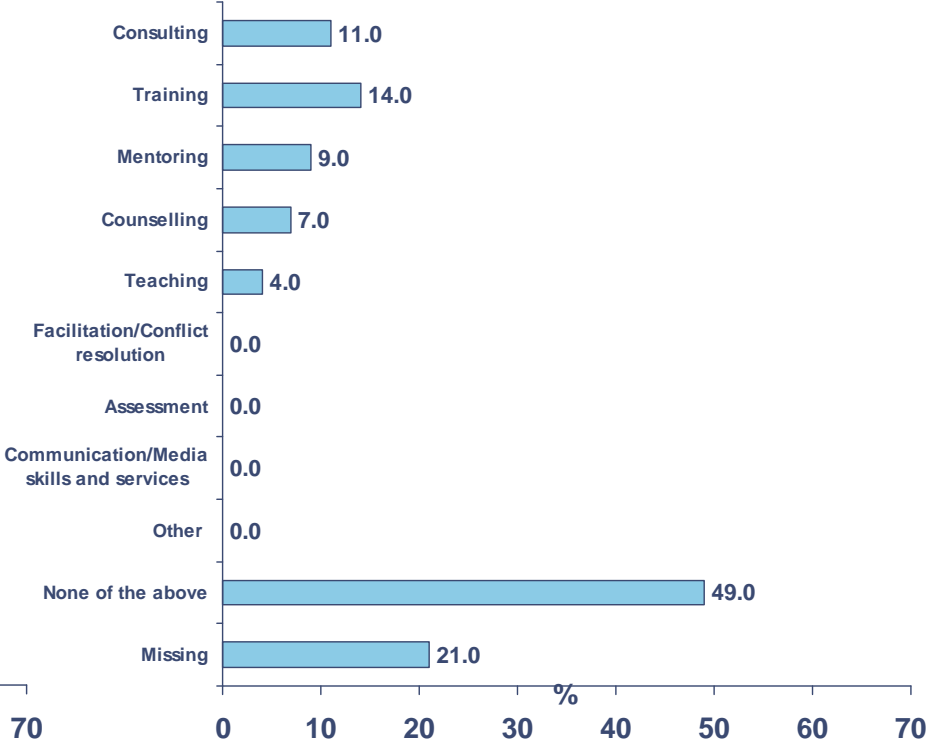
Profile of Coaching Industry

Other services offered by professional practices, in addition to coaching

Global



China



Global Base: 5415
Multiple response: totals >100%

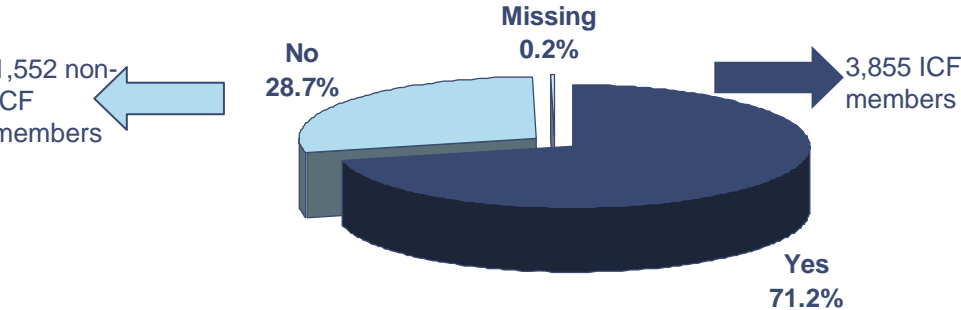
China Base: 686

ICF Membership/Credentials

ICF Membership/Credentials

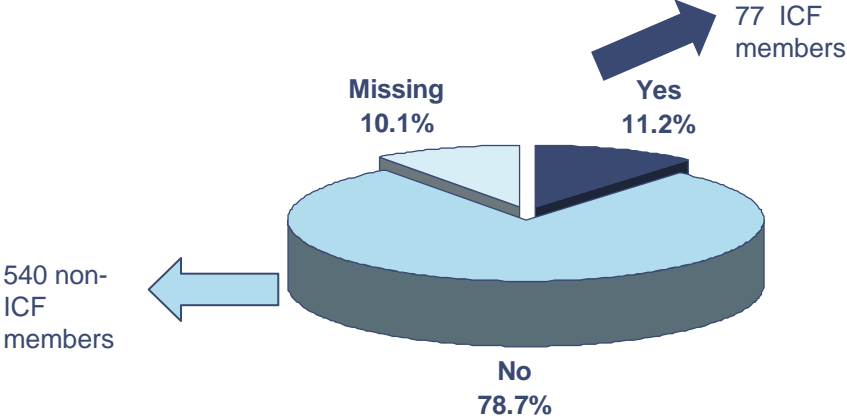
Are you a member of ICF?

Global



Global Base: 5415

China

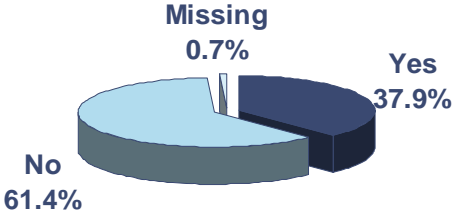


China Base: 686

ICF Membership/Credentials

Are you a member of any other professional coaching organization?

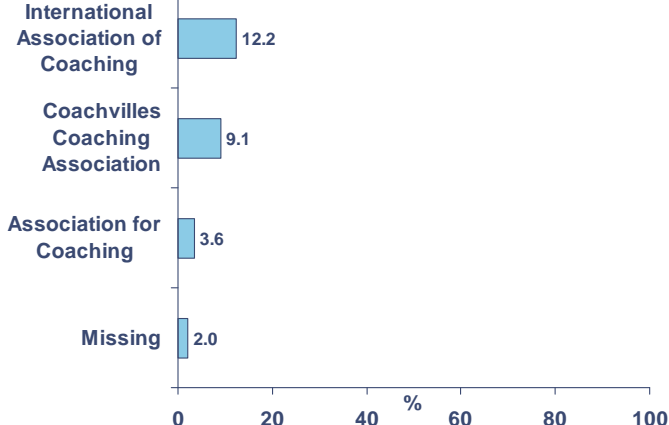
Global



Global Base: 5415

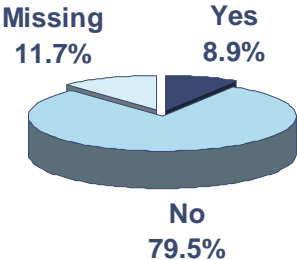


Other professional coaching organizations

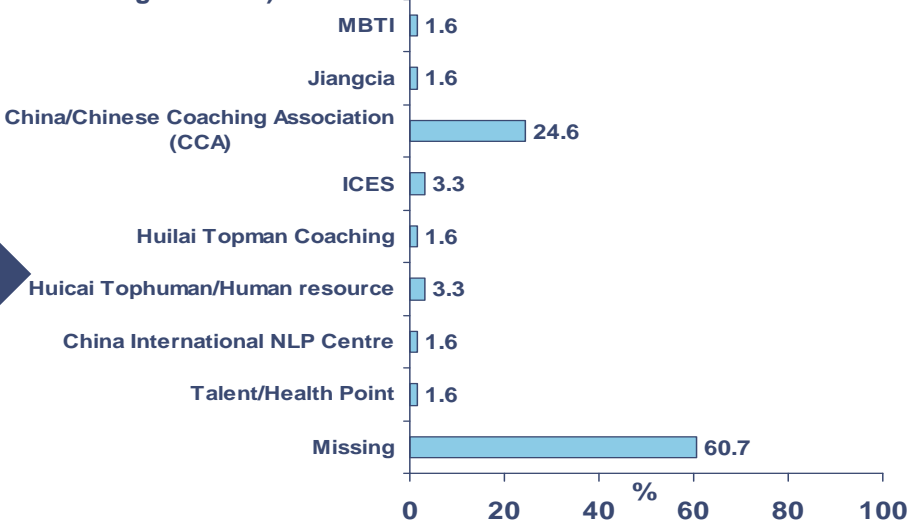


Global Base: 2,050 (member of another professional coaching organization)

China



China Base: 686

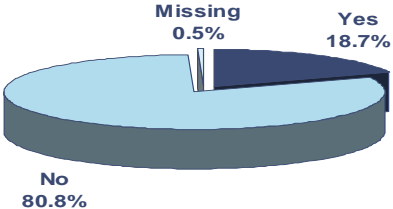


China Base: 61 (member of another professional coaching organization) November 2007

ICF Membership/Credentials

Do you presently hold an International Coach Federation credential?

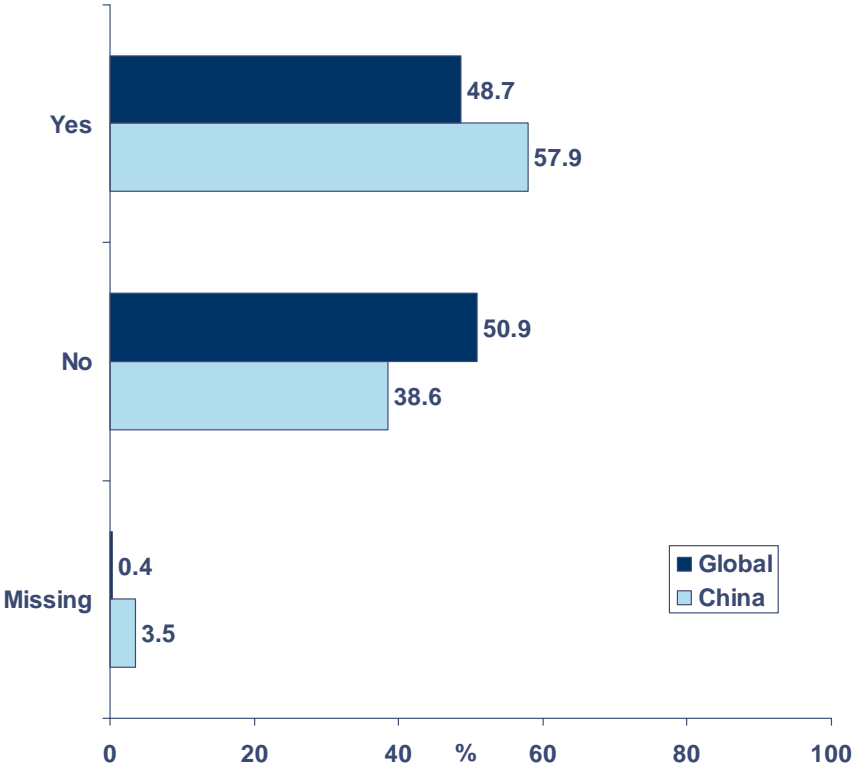
Global



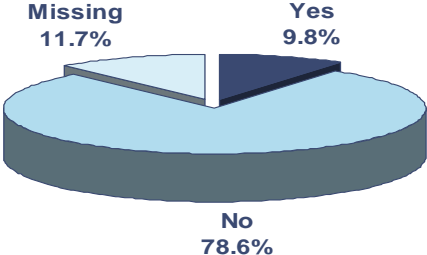
Global Base: 5415



If No, are you currently working toward an International Coach Federation Credential (ACC, PCC, MCC)?



China

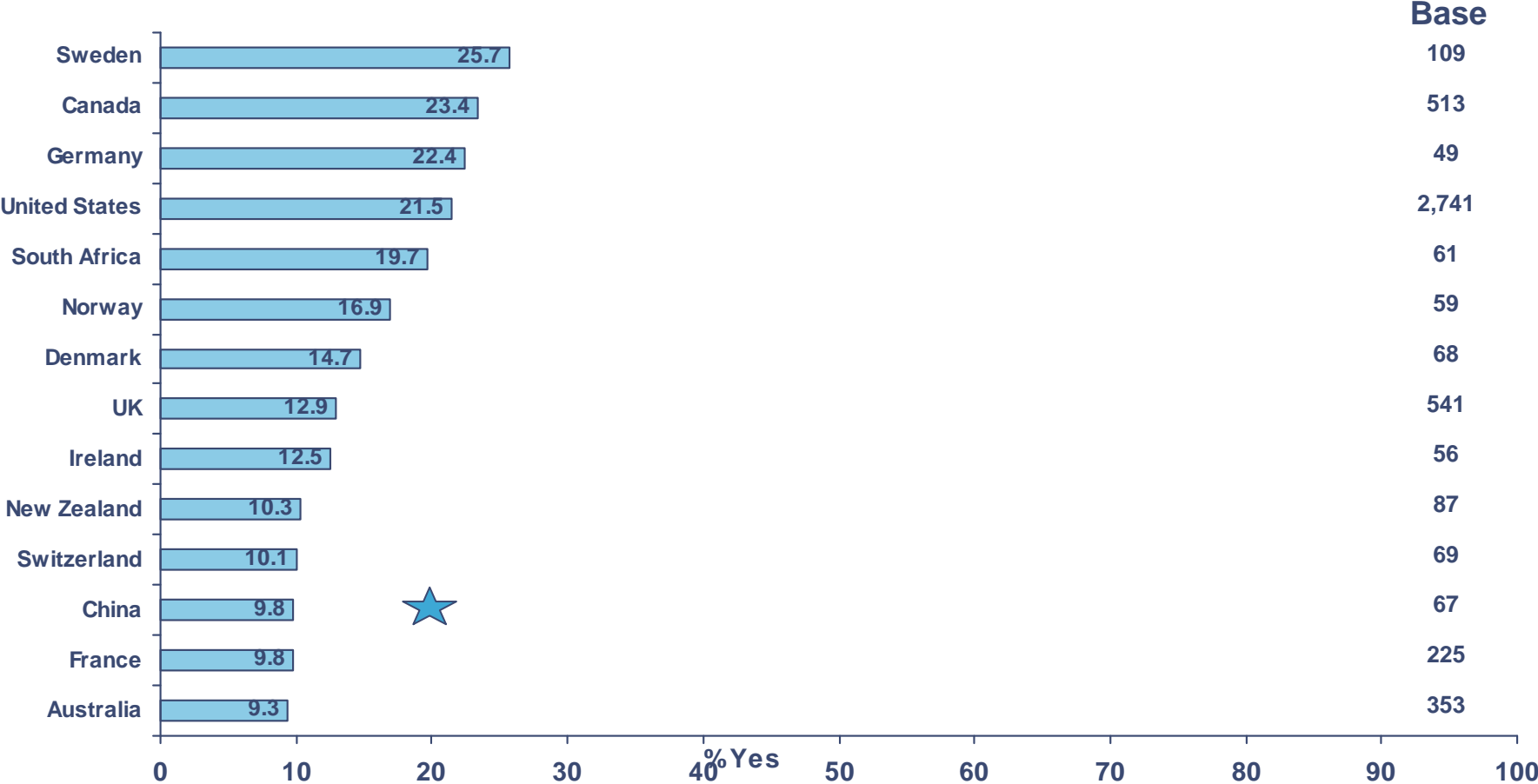


China Base: 686



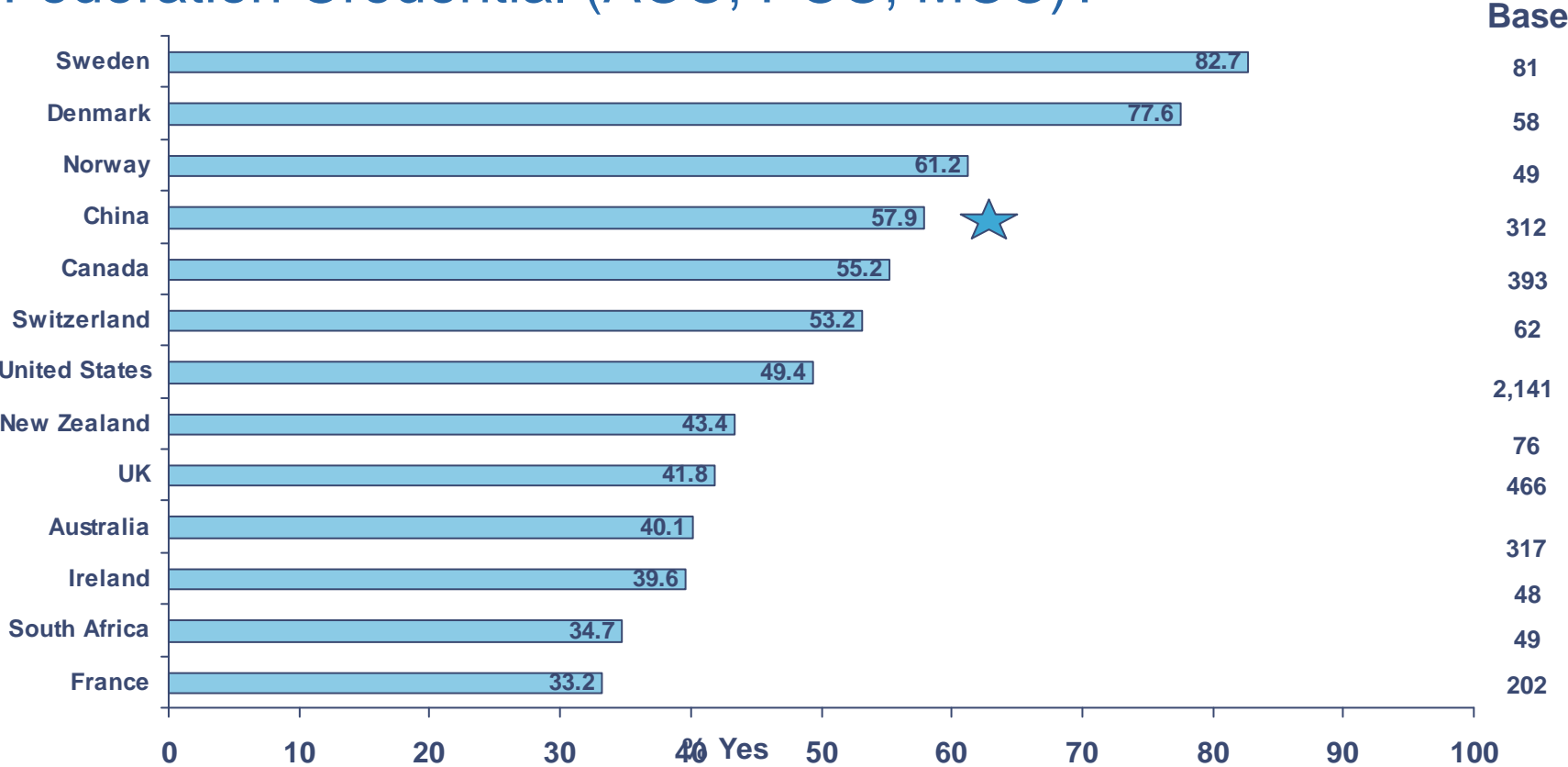
Credentialing by country

Do you presently hold an International Coach Federation credential?



Credentialing by country

Are you currently working toward an International Coach Federation Credential (ACC, PCC, MCC)?

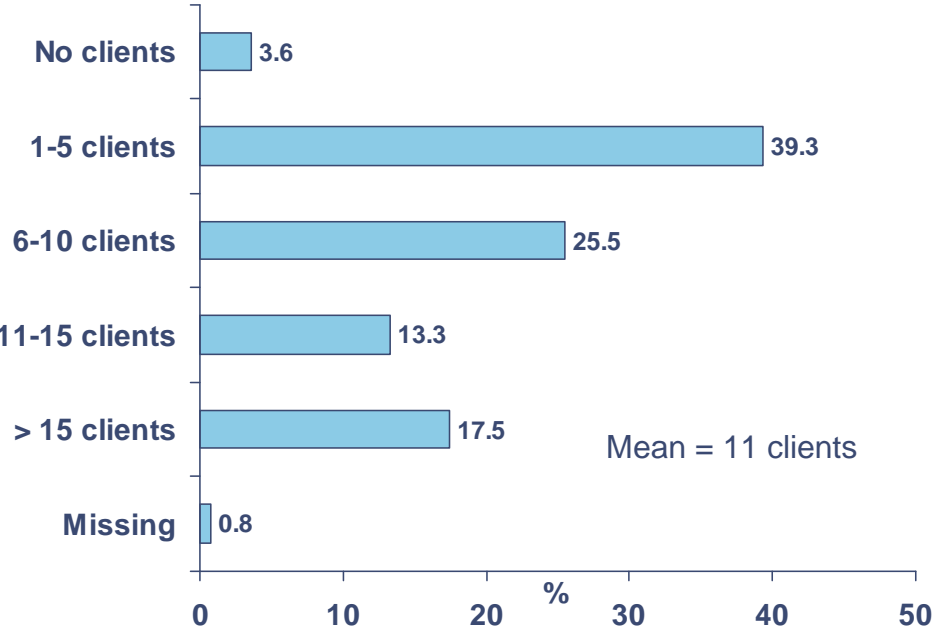


The People You Coach

The People You Coach

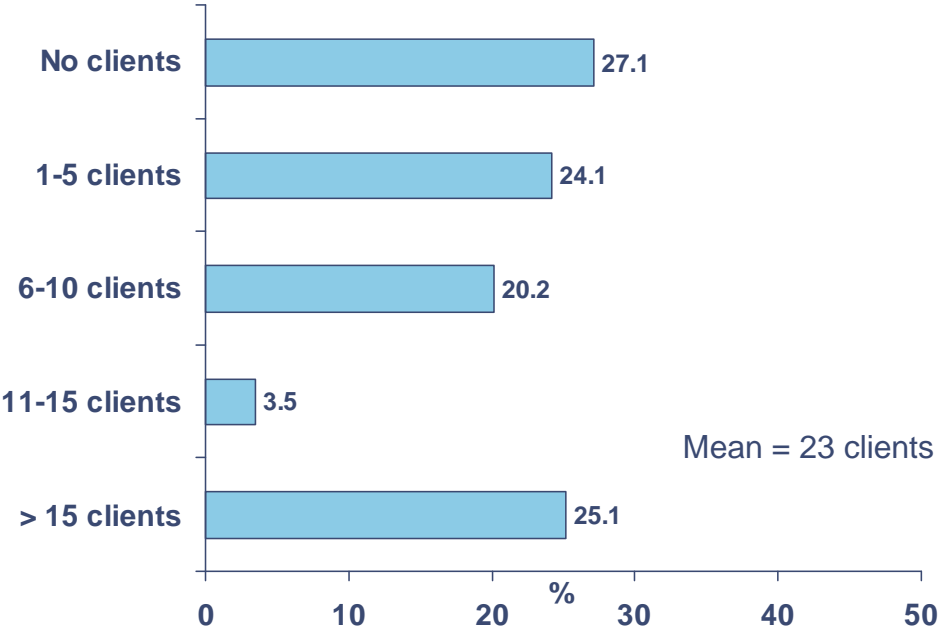
The average number of current active clients is...

Global



Global Base: 5415

China

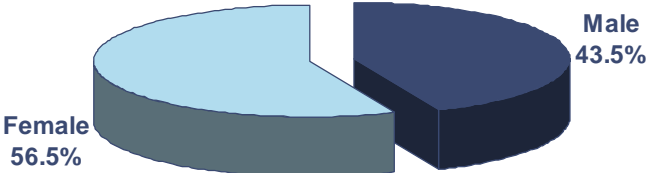


China Base: 203

The People You Coach

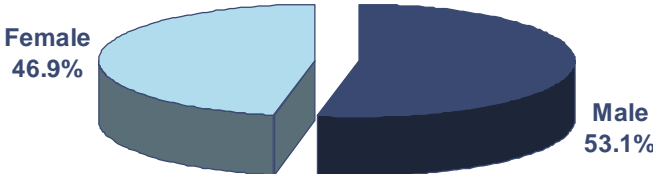
Gender profile of active clients

Global



Global Base: 5166

China

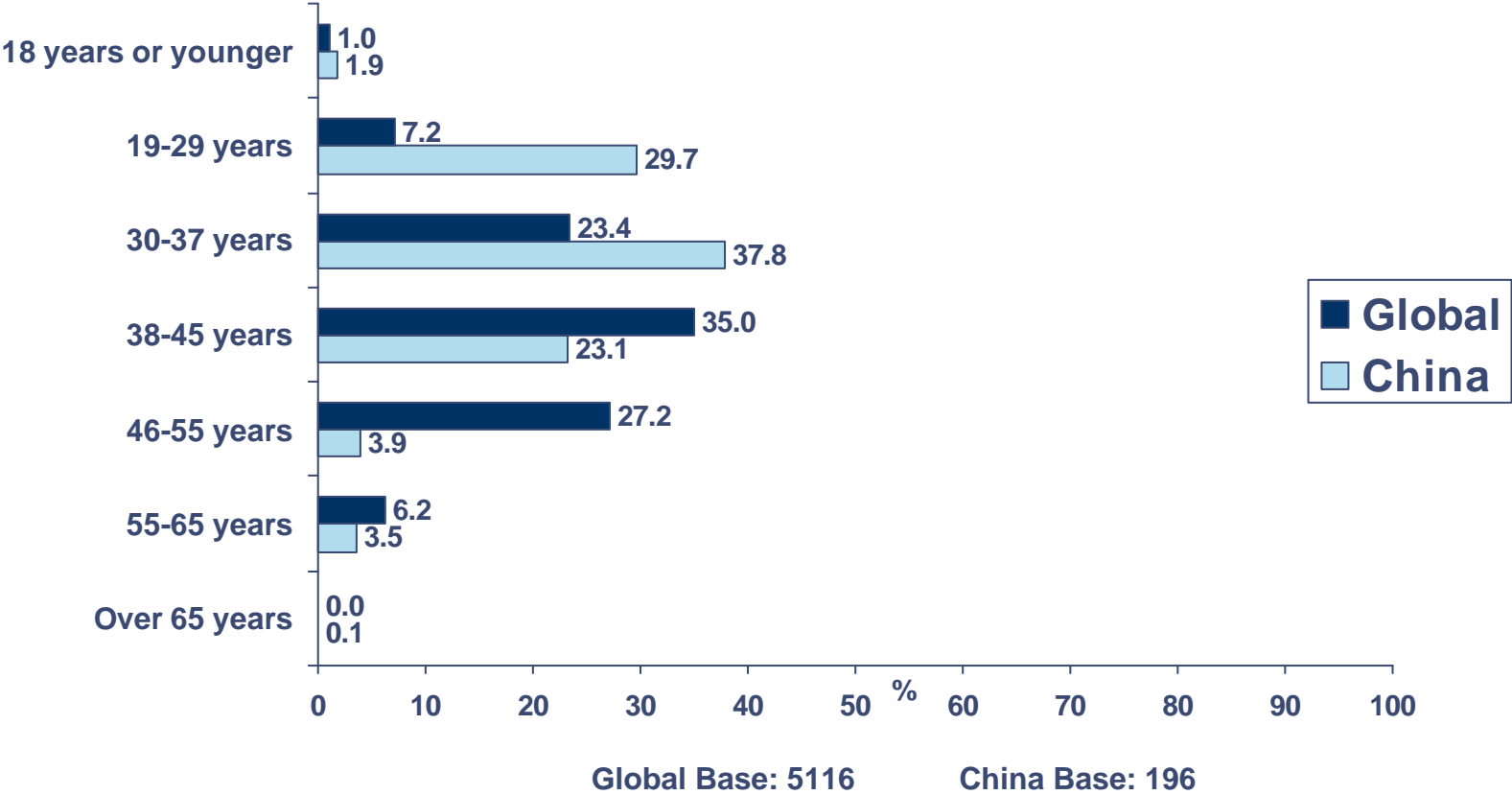


China Base: 214

Base numbers apply to those currently with active clients that supplied % split
Mean of percentage response: respondents asked to provide % split of male v. female clients

The People You Coach

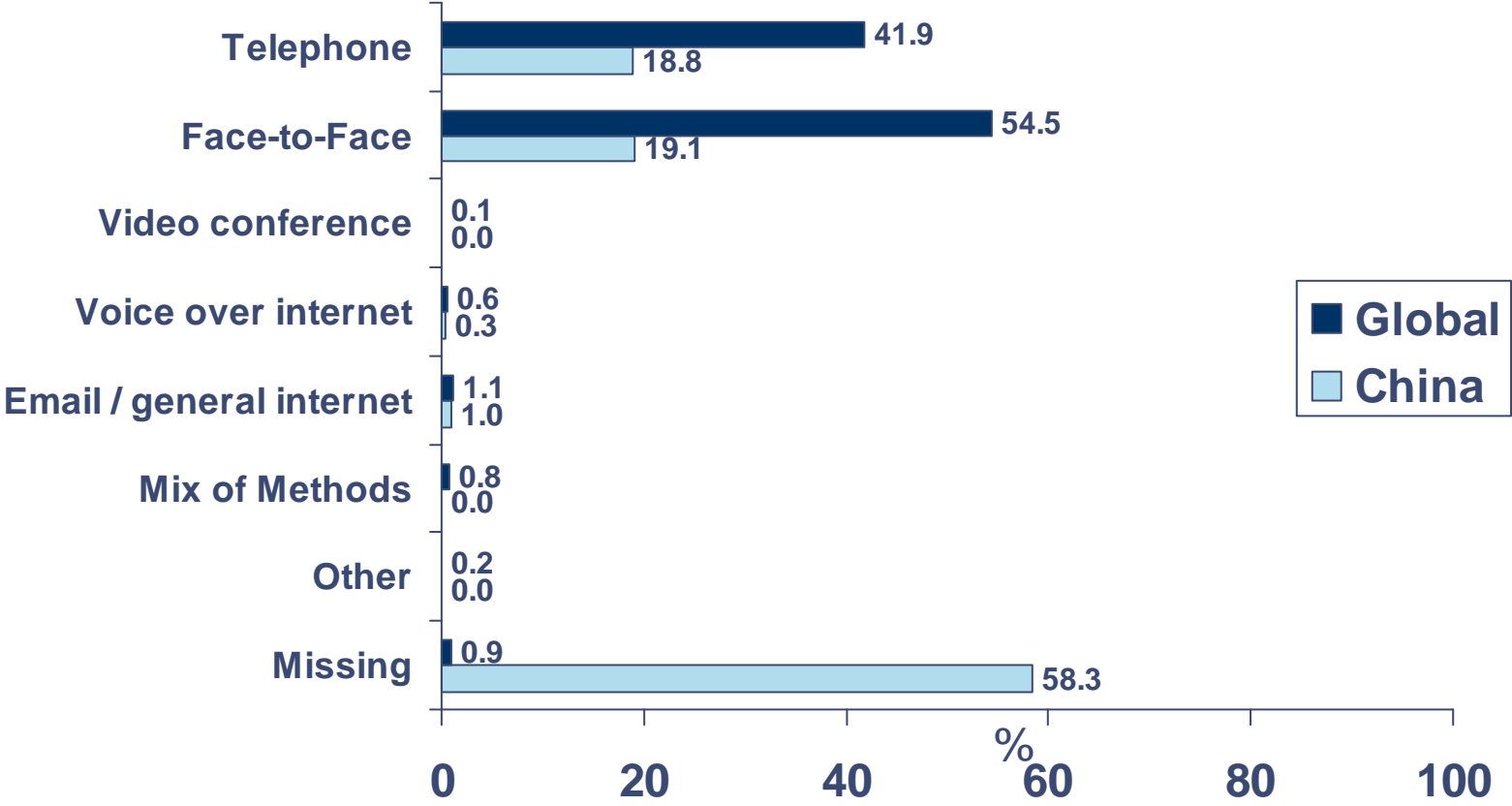
Age profile of active clients



Base numbers apply to those currently with active clients that supplied % split
Mean of percentage response: respondents asked to provide % age split of clients

The People You Coach

Main method used to coach active clients



Global Base: 5415

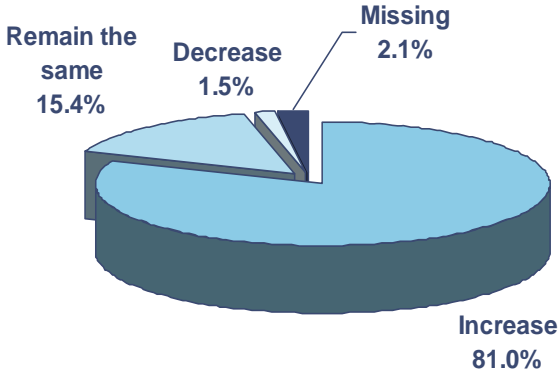
China Base: 686

The Size of the Profession

The Size of the Profession

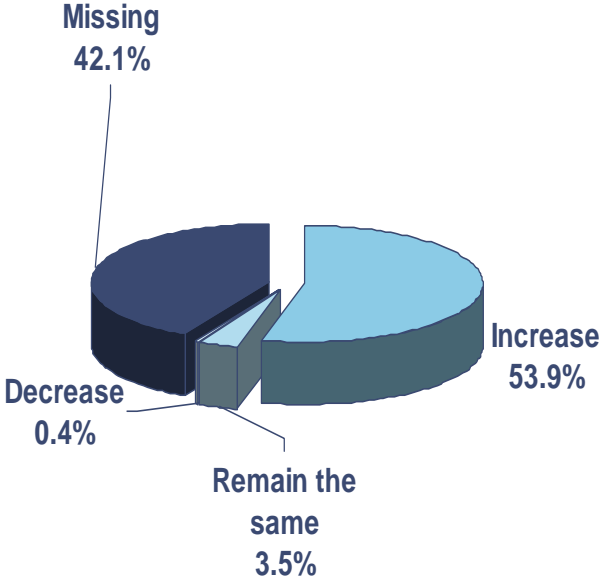
Expectations of revenue over the next 12 months...

Global



Global Base: 5415

China

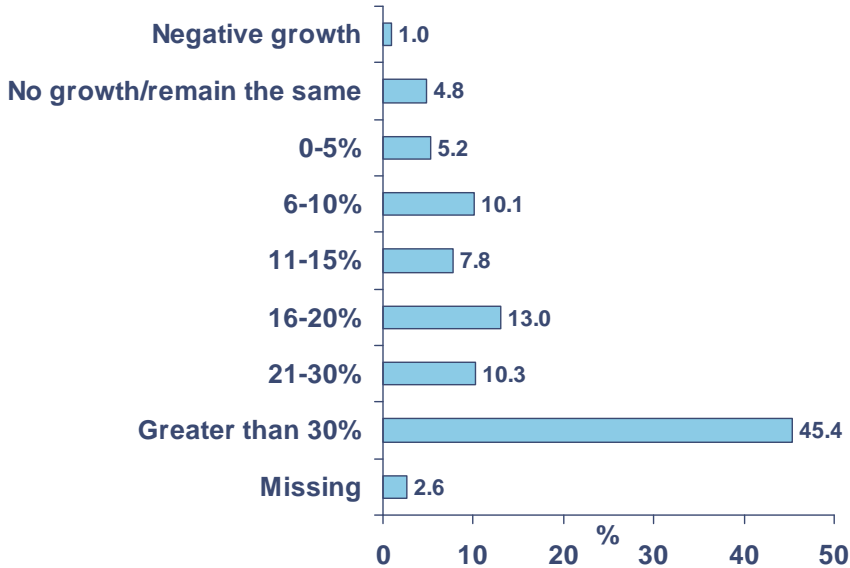


China Base: 686

The Size of the Profession

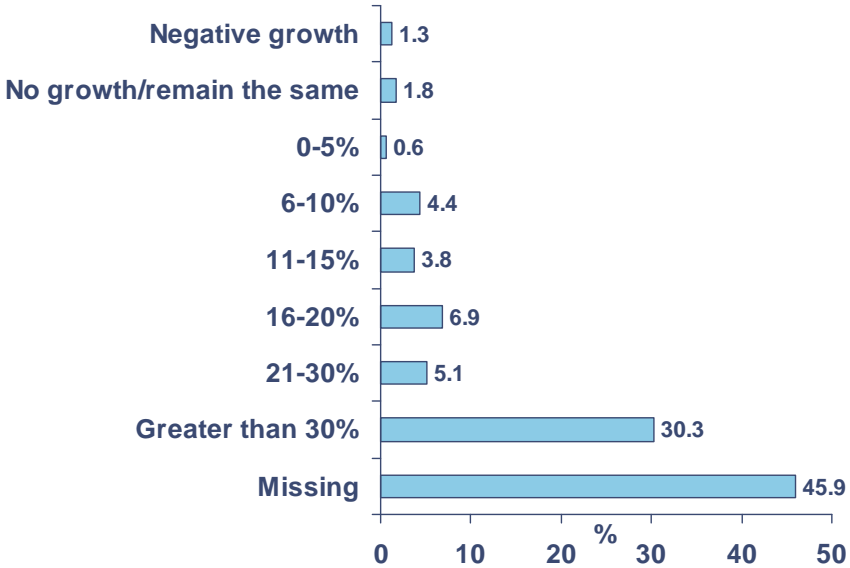
Forecast rate of growth over the next 3 years... (The total % growth expected from 2006 to 2009)

Global



Global Base: 5415

China



China Base: 686

The Size of the Profession

Annual revenue generated by coaching alone

Global

Mean	Maximum	Minimum	Base
\$50,510	\$800,000	\$1,000	4,450

Global revenue, based on 4,450 responses: \$224,770,277

China

*Small base for China – please treat result with caution

Mean	Maximum	Minimum	Base
\$8,250	\$128,466	\$128	66*

China revenue, based on 66* responses: \$544,530.43

The Size of the Profession

Estimate of total global revenue generated by coaching alone

- Based on an estimated universe of 30,000 coaches, globally
- With USA accounting for approximately 50% of global revenues

Total global revenue estimated at \$1,500,000,000

The Size of the Profession

Average fee for a 1 hour coaching session

Global

Mean	Maximum	Minimum	Base
\$205	\$5,000	\$10	4,948

China

*Small base for China – please treat result with caution

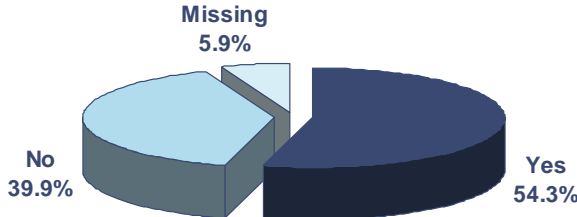
Mean	Maximum	Minimum	Base
\$169	\$1,285	\$9	28*

The Size of the Profession

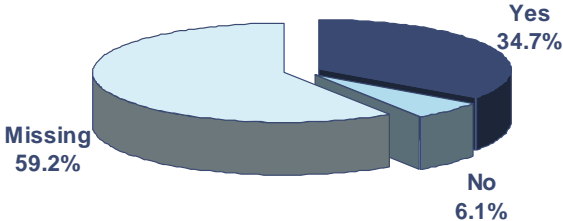
Other arrangements offered for coaching services

Pro-bono

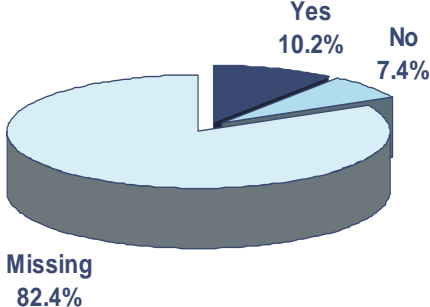
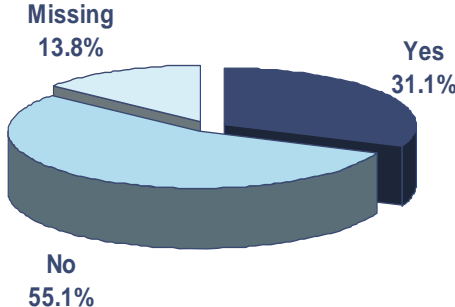
Global



China



Barter



Global Base: 5415

China Base: 686

The Size of the Profession

Average annual spend on professional development as a coach

Global

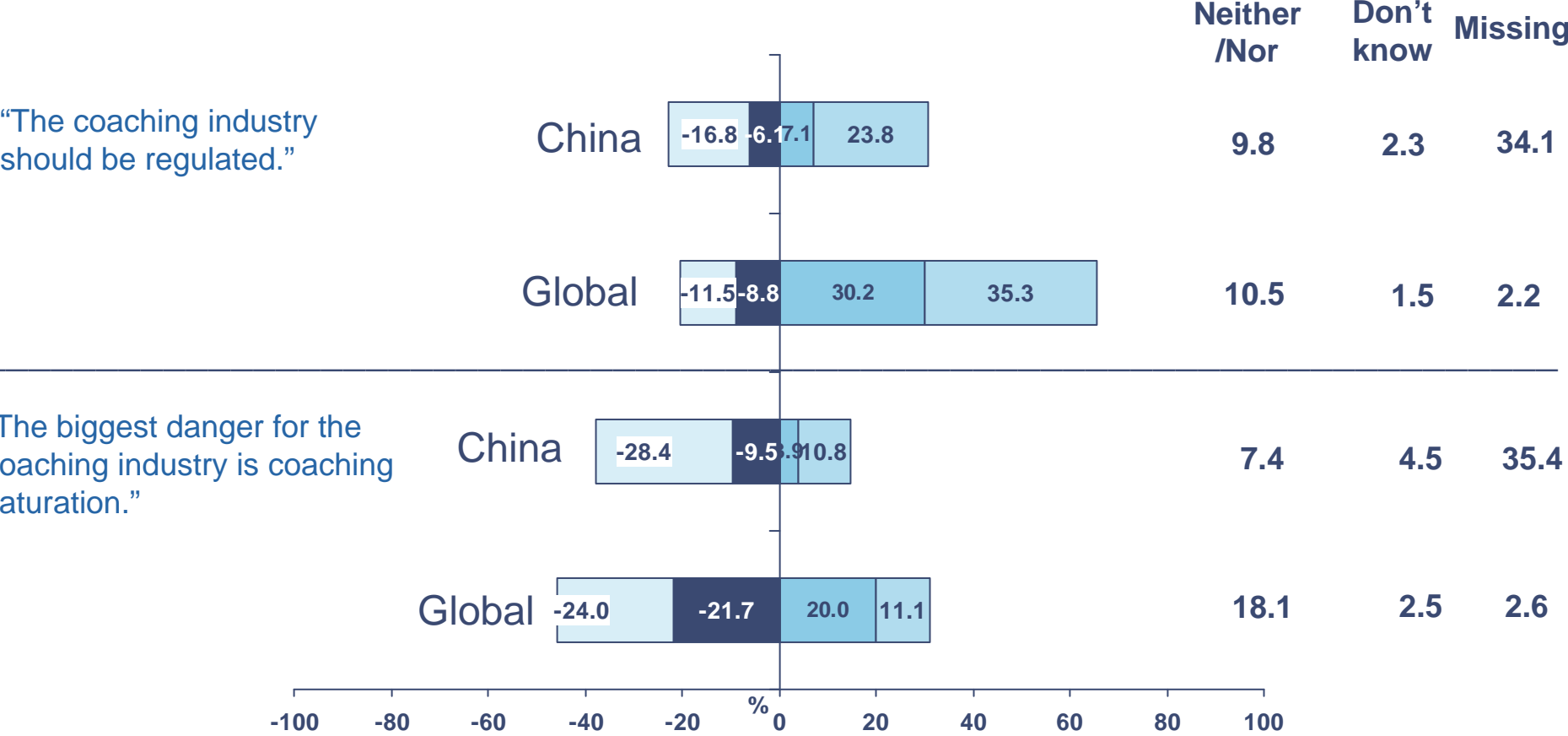
Mean	Maximum	Minimum	Base
\$4,219	\$40,000	\$100	5,014

China

Mean	Maximum	Minimum	Base
\$3,427	\$50,000	\$128.47	150

Key Issues Facing the Coaching Industry

Key Issues Facing the Coaching Industry

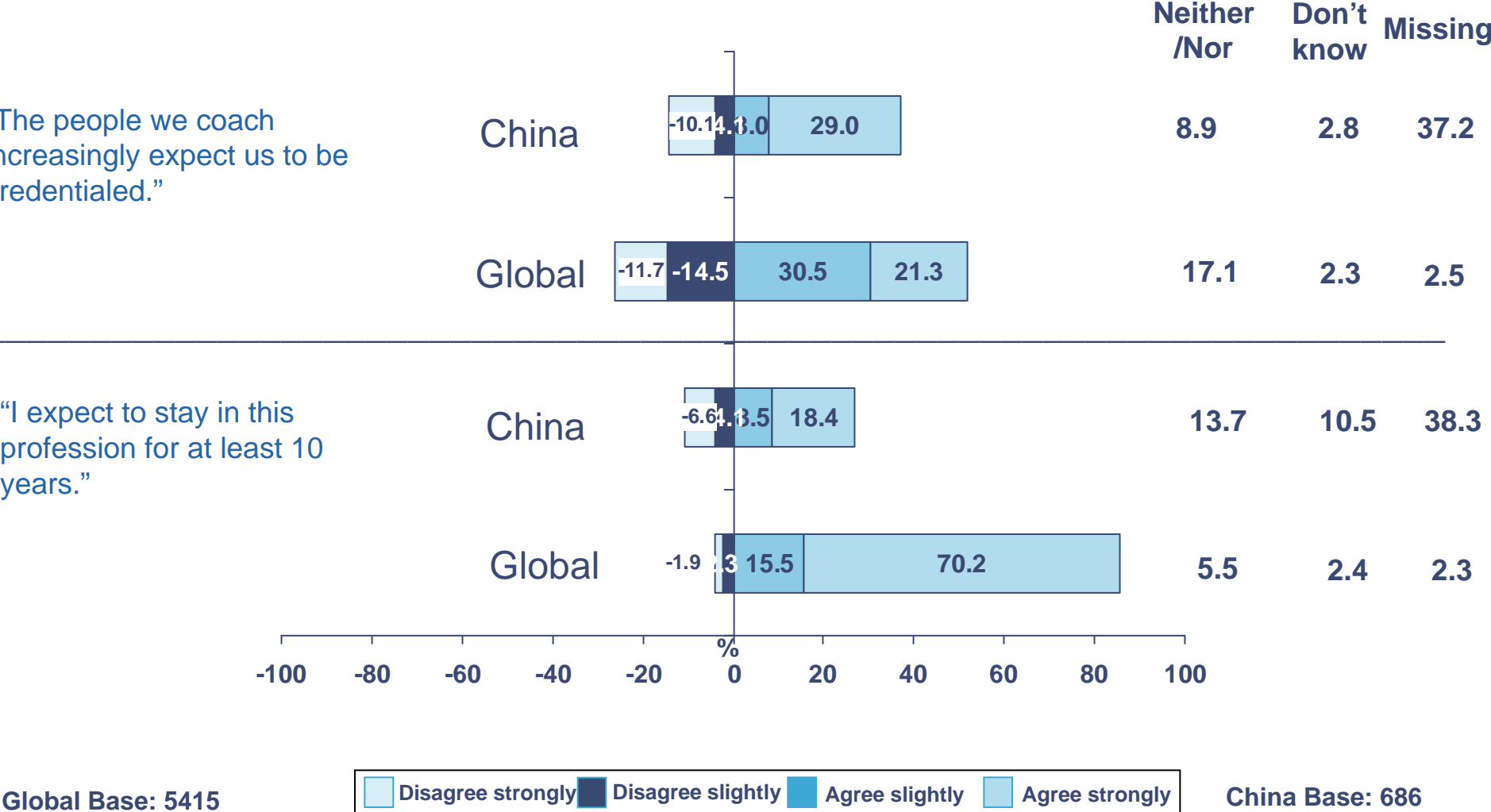


Global Base: 5415



China Base: 686

Key Issues Facing the Coaching Industry



Global Base: 5415

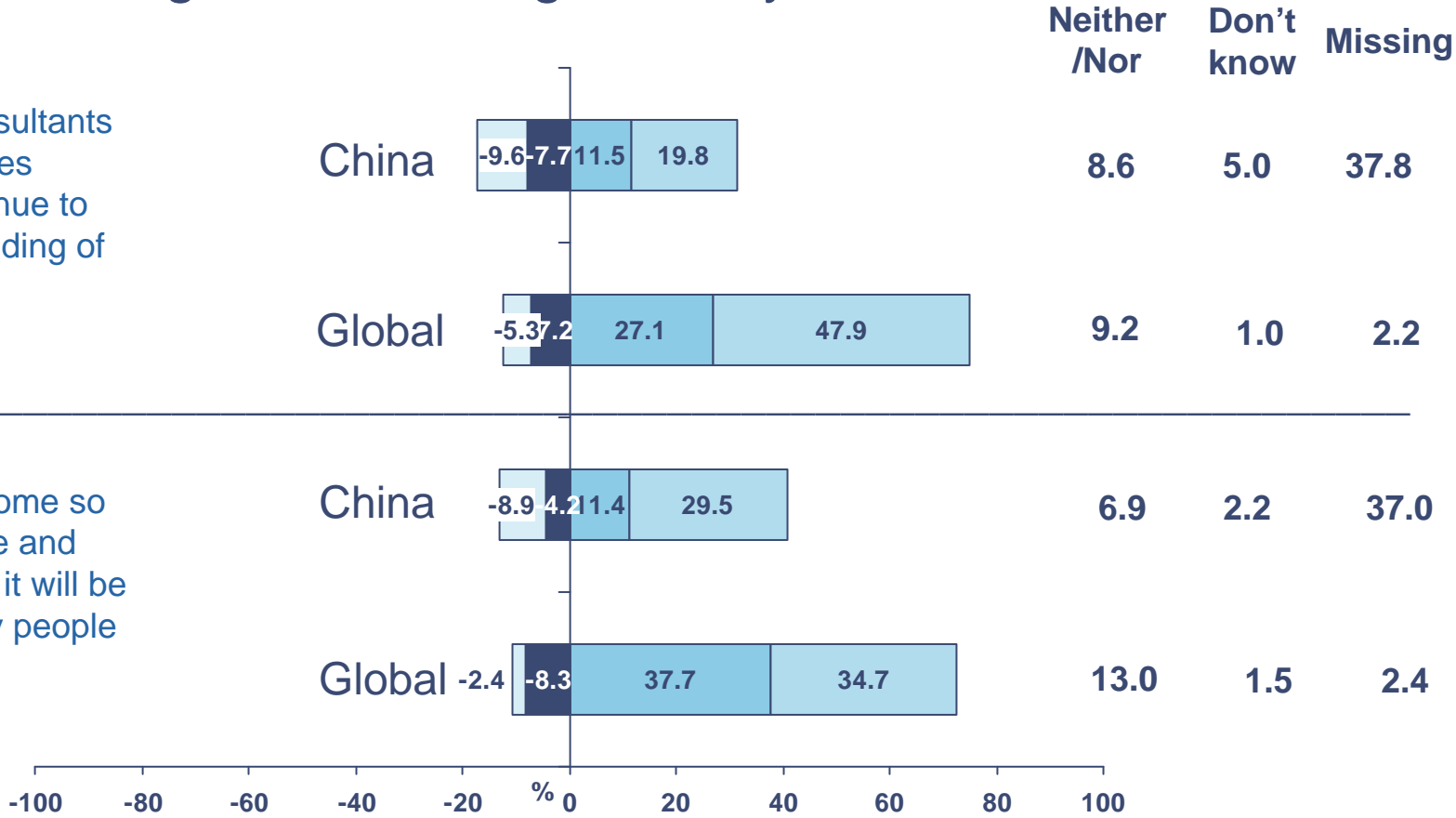


China Base: 686

Key Issues Facing the Coaching Industry

“Trainers and consultants who call themselves coaches will continue to blur the understanding of coaching.”

“Coaching will become so powerful, pervasive and commonplace that it will be widely accepted by people everywhere”



Global Base: 5415

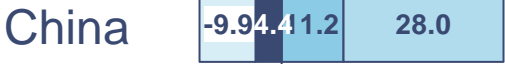


China Base: 686

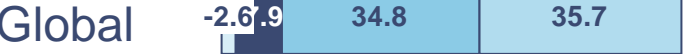
Key Issues Facing the Coaching Industry

Neither /Nor Don't know Missing

“There will be full academic acknowledgement of coaching as a discipline.”



7.9 2.2 36.4



14.2 2.6 2.3

“Coaches will be sought out and included in high stakes conversations at all levels of diplomacy, business and government.”



9.5 4.2 37.0



18.3 3.0 2.3



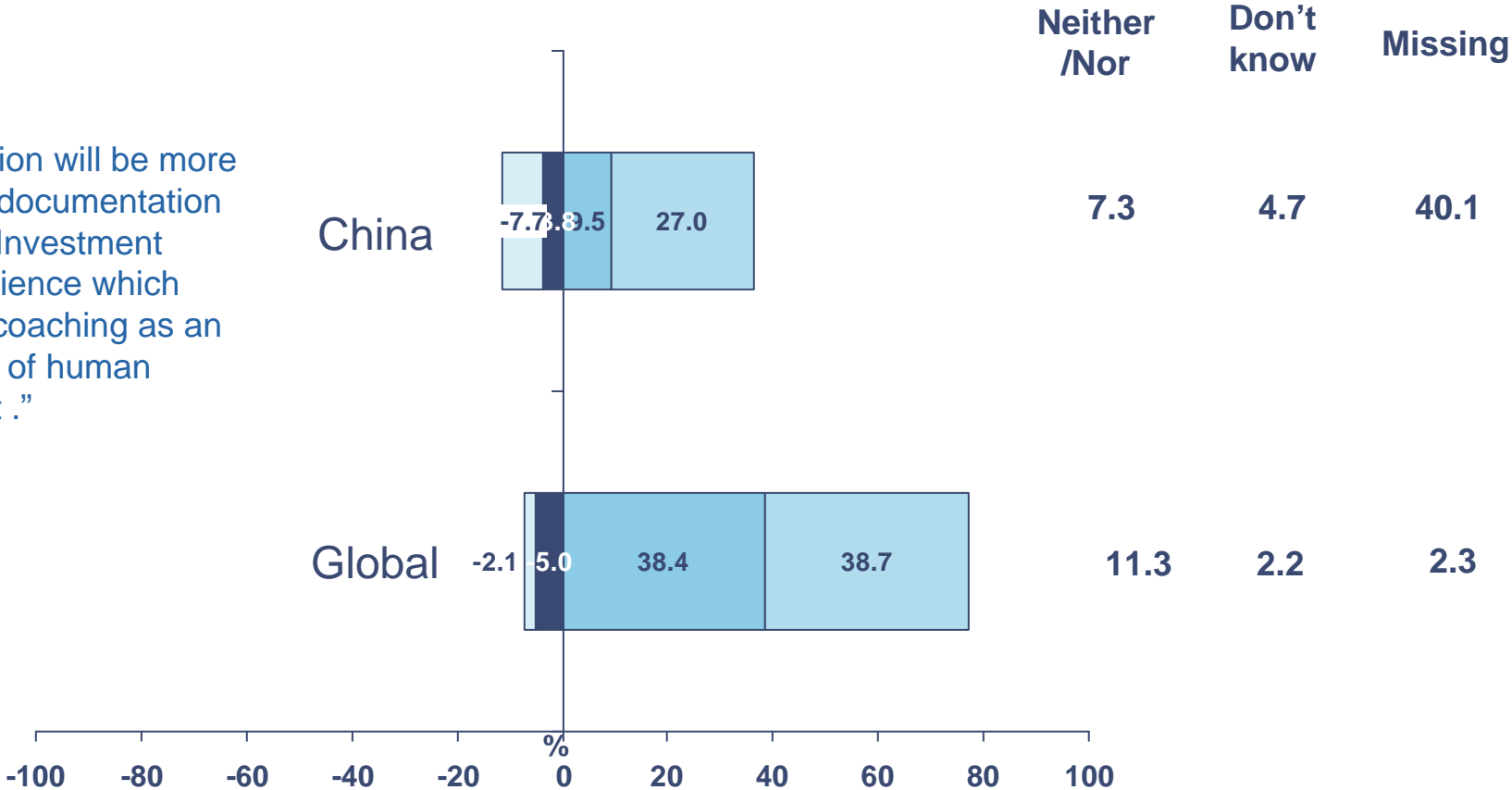
Global Base: 5415



China Base: 686

Key Issues Facing the Coaching Industry

“The profession will be more grounded in documentation of Return of Investment (ROI) and science which will validate coaching as an effective tool of human development .”



Global Base: 5415



China Base: 686

Looking Forward

What ICF could provide/do to make membership more valuable

Top 5 areas which would make membership more valuable	Global Rankings	China Rankings
Increase awareness levels and improve communication amongst ICF members	1	1
Provide regular training for coaches through forums, information distribution and tools	2	3
Provision of more support, incentives and benefits to ICF members	3	-
Increased recognition for ICF and associated accreditations within the coaching industry	4	2
Provision of more local, regional and global based events for coaches	5	-
Increase / develop client base and revenue	-	4
Provision of database allowing coaches to network/exchange ideas with other providers/disciplines	-	5

The biggest opportunity for coaches going forward is...

Top 5 opportunities for coaches going forward	Global Rankings	China Rankings
Personal and Professional development	1	1
Improving public awareness, acceptance and perception of coaches	2	4
Recognition and regulation of the coaching industry standards	3	3
Develop / grow client base and revenue	4	2
Development of new coaching approaches / methods / coaching skills	5	5